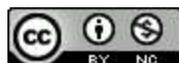




HOW-TO DRAFT CROWDSOURCING IDEAS AND CONTENT FROM SUPPORTERS

This doc was designed to travel. Please feel free to share this link around with other progressive campaigners. You can download this (look under File menu top left) in several formats.

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Disclaimer / request for your help

This is a work in progress that is meant to evolve over time with input from campaigners. At the moment, the tips and ideas here reflect the voices of the [contributors/reviewers listed below](#). We are always looking to add more voices of campaigners that have knowledge and experience on this topic. If this is you, please contact us here: blueprintsfc@gmail.com.

Summary

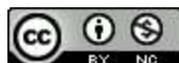
Crowdsourcing is the process of opening a creative or problem-solving exercise to include input from a wider group outside of the usual inside thinking and decision-making channels. The wider concept of crowdsourcing includes solicitation of “user-generated content”, which can include multimedia creative submissions.

In advocacy and movement-building, this can mean asking your supporters for their ideas to build a group visioning process or for their input on proposed policy platforms or even strategic campaign plans. The user-generated content side of advocacy crowdsourcing typically involves organizations receiving and using creative concepts from their base in campaign communications. Such creative can include campaign slogans, custom re-branding, images and videos.

Who else is doing it?

In advocacy:

Internet and media freedom advocates [OpenMedia](#) have done extensive crowdsourcing to build their policy platforms and more. In Canada, digital campaigners [Leadnow.ca](#) also partnered with Open Media to gather public input to reimagine the future of the country’s main [public broadcaster](#). In 2015 [Our Tomorrow](#), a joint effort by over 100 LGBTQ orgs, held a vast crowdsourcing exercise in the U.S. to help determine the



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future direction their movement should take, as informed by their base. [Greenpeace Germany](#) has used a crowdsourcing platform to find creative and communications concepts for their Save the Arctic Campaign. Various climate campaigns and the [Support. Don't Punish.](#) drug policy campaign invite and make use of user-generated content including slogans, campaign logos, memes and more.

In policy-visioning:

The [Roosevelt Institute](#)'s Next Generation Blueprint is a crowd-sourced position document. This student-created policy agenda was designed as a rallying cry for the values of the student network, an agenda for legislators to address, and a method of thinking about values-based areas of focus which that could be paired with specific policy recommendations.

The writing of document was proof of it's thesis, as it involved a series of back-and-forth exchanges of information between groups of Roosevelt stakeholders and Roosevelt staff. Everything in the document, including the eventual thesis, came from spaces built with stakeholders, and the result was a high degree of buy-in throughout the student network.

In politics:

At the height of its recent political and economic crisis, [Iceland launched a process to crowdsource a new constitution](#), which is finally making its way towards implementation. In Spain, the progressive movement-generated Podemos party has used crowdsourcing and participatory policy creation from the beginning. In Quebec, Canada, [a vast digitally-assisted citizen consult](#), including kitchen table discussions and larger assemblies, was held in 2016 to build a new progressive platform and to reinvigorate progressive politics there.

Case study focus: OpenMedia

[OpenMedia](#), one of the main groups across the world active on the issues of Net Neutrality and media freedoms, has engaged in a long line of crowdsourcing projects, experimenting thoroughly along the way and refining the practice more than most other groups in the process.



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In 2008, when facing off on the first big Net Neutrality battle, Open Media turned to its community and actively sought citizen testimonials in order to bring public voices to policy debates. In 2010-2011, when the Canadian government was considering a usage-based billing structure for internet data, Open Media's supporters raised the issue as a top concern and the organization decided to open up wide to supporter input, raising 500K signatures on a petition and then unleashing a torrent of supporter-generated artwork and thousands of comments, which were reflected back to the community and then sent to the CRTC (Canada's federal comms regulator). When a regulatory official then went on record to say that citizen input was irrelevant, it cost him his job, generated a lot of media attention and Open Media was able to force a policy decision in line with public, not corporate, interests.

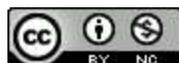
Having used crowd input to fight bad policy, Open Media then decided to engage its community's intelligence in positive visioning. In 2012-2013, over 40, 000 participants from over 155 countries participated in building a collective vision of what a global digital policy framework that served peoples' interests would look like. The result is their [Our Digital Future report](#). Open Media now continually bakes crowdsourcing and listening practices into its campaign design process, asking for ideas on tactics and even what future issues to campaign on. As a result, the org has developed a highly loyal and participatory supporter community.

Impact/ Why do this?

The benefits of rolling this way....

Immediate benefits from crowdsourcing include gaining insights from your base and drawing on "[collective intelligence](#)" to open new strategic and creative pathways for campaigning organizations.

Involving your base as participants in thinking and creative exercises also **deepens member engagement** and a sense that there is a meaningful role for supporters to play in building the campaign/organization.



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When crowdsourced policy proposals are presented in political advocacy, they carry a lot more weight as they genuinely represent a multitude of voices.

According to Open Media, when organizations actively listen to their base and show them that they value their ideas and input, this build a much more loyal and engaged supporter base that translates into higher response rates on actions and more effective fundraising.

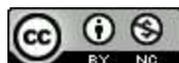
When this might not work for you

According to Steve Anderson founder of Open Media, the biggest issue is org capacity. Because active crowdsourcing does take a lot of time and resources to initiate and manage properly, and because the ROI from these activities (engagement and eventually better fundraising) doesn't kick in right away, embarking on crowdsourcing requires strong leadership, vision and commitment right through the organization. If short-term metrics are all that count, this will be hard to sell through.

The other issue is whether the org culture and structure is a fit for crowdsourcing, which requires opening up to supporter input and actually doing something with it. Some orgs are top-down in structure and led by folks who think they have the best ideas and not much to learn. Such groups have a culture that doesn't value their community, which they view as data points or just a number on their mailing list count. In Open Media's case, there was a sincere belief that the supporter community sometimes had the best ideas and over time, even a commitment to let supporter input override staff ideas and plans.

Finally, if your organization's identity, ideas and branding are firmly nailed down due to funder demands or a (probably antiquated) fixation on the power of the organizational brand, you might find it tough to do anything with the inputs you get from a crowdsourcing exercise.

If your supporter base feels they contributed and gave you their time and effort for no good reason, this could lead to backlash so be careful about what kinds of power and prominence for supporter input is proposed upfront. Ultimately, if you can't deliver on your promises, it could end up being more damaging than doing nothing.



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Crowdsourcing at different levels

Crowdsourcing can take different forms, from light input to collective policy design.

At the simplest level, it can involve calling on public feedback in response to existing campaign plans, documents or other communications.

As part of a creative process, crowdsourcing can involve public call-outs for slogan ideas or submissions of supporter-generated artwork.

As a passive process, organizations can search through supporter-generated material and highlight it in their communications back to their base.

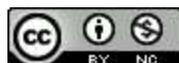
Case study: Below, [OpenMedia](#) shares the different crowdsourcing initiatives they have deployed

ONGOING DIALOGUE: This is the lowest effort method and simply requires reviewing online/offline community input review and thought before producing output. This is roughly the method we used for [Casting an Open Net](#) and at OpenMedia we mostly do this without thinking about it. We have Slack channels devoted to this form of input. This mode of crowdsourcing does require ongoing dialogue with the community obviously.

COMMENT THREADING: Pulling demonstrative comments from our community into blogs and other content. The comment in [this blog](#) is a good example. There's no better way for us to operate as a community platform than to ensure direct community comments are included in our content.

THEMATIC INPUT: Call for community input through email and/or blogs or social media and break down comments into rough themes. Use the themes to instruct presentations and key meetings. Here's an [outreach example](#), and an example of a [crowdsourced presentation](#).

We sometimes use our [Internet Voice tool](#) to collect input for this method.



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QUANTITATIVE AND QUALITATIVE ANALYSIS: See the methodology section [here](#). We collect input through various methods including our Internet Voice Tool and Crowdsourcing tool.

CROWDSOURCED PLANS: Usually our Crowdsourcing reports and policy plans include all of the above. We basically see every interaction with our community as an input point we use to shape our detailed policy proposals. Our [Privacy Plan](#) in Canada is good example.

Case study: Below, Alan Smith describes how the Roosevelt Institute build the Next Generation Blueprint as a collective policy-visioning process

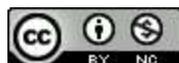
The Roosevelt Networks, with the creation of our Next Generation Blueprint, "laid out a student-created policy agenda that we hoped legislators would address, with values-based areas of focus paired with specific policy recommendations. Because, as Roosevelters wrote, "we believe that it matters who writes the rules, not just what rules are written, it includes recommendations for rethinking how young people engage in the decision-making process by increasing voter access and diversifying the pool of emerging leaders." The final report also includes a lobbying tool—a tearaway set of recommendations for how political leaders can engage with the millennial generation."

Quoting from: [Organizing First: A Case for a Hybrid Version of Stakeholder Engagement](#)

What this requires (people, resources, etc.)

According to Open Media, the first thing you need is an audience or a community to source from. In other words, a database of supporters that is easy to reach out all at once. This is usually built up over time through low-barrier actions such as petitions and other sign-up-driving campaigns.

At its most basic form, crowdsourcing could require no extra infrastructure and just staff or supporter time invested in interacting with supporters on social media and noting their



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input. This requires a person/people who can put out content, converse, and bring back input to the campaigns team.

If the input sought is quantitative, ie. what percent of people care about x issue, then you will need to configure and use some kind of online survey tool like [survey monkey](#).

If the input sought is creative, ie. users have to write and submit texts, produce videos, images etc., a simple and easy-to-use portal/ application may need to be created for this. For their wider survey consult, Open Media created a 'drag and drop' policy construction tool. Our Tomorrow, for its part, created a custom web portal for the submission of short texts and videos.

Crowdsourcing takes time. For user-generated content, the promotion of the request for input needs a few weeks to get out there through repeated callouts. Your supporters also need time to respond and provide content though having a clear deadline is key here as well as you cannot keep people infinitely engaged. If the crowdsourced content is extensive and you plan to make use of it in a formal report, leave at least six months time for the process from start to finish.

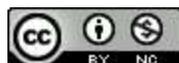
Setup steps /stages

Build an engaging frame for participation

To motivate your supporters to participate in any crowdsourcing exercise, the “why” of participation must be clearly established. What will this participation change? Will this use of time be meaningful, will it lead to something tangible that justifies my use of time? Organizers must clearly think through how they answer these questions upfront as part of the call to action.

Here is some direct guidance on the above, drawn from [OpenMedia](#):

Show a compelling THEORY OF CHANGE that works.



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Research shows that those who do not take action are held back because they did not believe that their actions would have an impact.

- Provide a roadmap that shows how the process will work - how they will get from A to B and make a difference.
- Illustrate the theory of change as much as possible: When we ask people to send a message to regulators, we also say that if you submit a message we'll attend a hearing on your behalf and that the combination of citizens speaking out, alongside expert testimony, will create a powerful force.
- Clearly illustrate that we can work together to create a positive vision for the future and bring it fruition.

Make participating clear and easy

Encouraging your supporters to submit their thoughts and creative concepts is already a big ask. The clearer and easier you can make the assignment, the higher your participation rates will be.

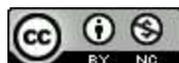
For example, when asking LCBTQ supporters about their hopes and vision for the future of the movement, Share our Tomorrow did not ask for essay-form submissions but rather the following short-format answers:

1. My hope for our tomorrow is _____.
2. I worry that _____.
3. One thing our movement can do to make our tomorrow brighter is _____.

Below, [OpenMedia](#) shares their suggestions for how to clearly structure crowdsourcing asks:

MEET PEOPLE WHERE THEY ARE AT: provide a range of activities at different levels of engagement.

AS A GENERAL PRINCIPLE MAKE COMMUNICATIONS ACCESSIBLE AND LINK TO MORE IN-DEPTH MATERIALS FOR THE KEENERS. You have to get people in the door before you can meet them and build a relationship.



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STRUCTURE THE PARTICIPATION so that people can engage at the level they are comfortable with.

Petitions, written letters/phone calls, social media engagement, surveys/interactive tools, in-person events/canvassing, creating their own content and becoming community leaders in their own right.

Some members of our community will be very knowledgeable and have a lot of time and energy for our projects. It's important to facilitate those deeply engaged in your processes — these participants are leaders in the making. Others just want the facts and a simple way to identify with the project — these folks just want to raise their hand with us and we should respect that.

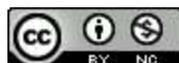
Establish a culture of conversation with your base

The more you ask your supporters for input, the easier this process will flow. Two-way interaction with campaign organizers doesn't come naturally to everyone at first but if it is regularly encouraged, it becomes a reflex.

Here is some advice from [OpenMedia](#) on how to build this “culture of conversation”

BUILD RELATIONSHIPS:

- Build relationships and communities not just lists or data points.
- Look at your first interaction as an introduction and your communications as a dialogue.
- Relationships should have MEANING AND PURPOSE. (For example, the purpose could be to be working together to stop online censorship.)
- Facilitate lateral communication between members of our community. At OpenMedia we invest in capacity to support community conversations on our website and social media.



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LOOK FOR OPPORTUNITIES FOR DEEPER AND MORE FREQUENT ENGAGEMENT and pull it into the mix of our project.

- Example: while we were working on our Casting an Open Net report we had a meeting with the Industry Minister come up out of the blue. Instead of just holding a regular meeting, we crowdsourced the questions we asked the minister and used the community input we received for our report. That wasn't planned in advance but we saw it as an opportunity for deeper input and engagement.

Mirror-back the value of supporter participation

Supporters who contribute to your campaigns with ideas or more need to see the value of their help reflected in your communications back to the base. Conversely, keeping their contributions for yourself in a black box will quickly discourage further participation.

Here is some advice from [OpenMedia](#) on how to show your supporters that you value their participation

GIVE RECOGNITION:

- Cynicism is our greatest enemy. As much as possible put on display the impact participants are making in the world.
- Research shows people want the satisfaction of an emotional meaningful experience. Recognizing those who make efforts in your project is a great way to model a participatory process and to keep our community engaged over the long term.
- It may be obvious to recognize large policy changes, but it's just as important to show how participants have made an impact on smaller pieces of our work, such as when our efforts are picked up in the media. No victory is too small to recognize.
- Understand participants and the community as the protagonist of the story. Good or bad, the world really does change based on how and in what ways we participate in our society. Let's remind ourselves of this fact.
- Communicate and popularize the idea that we all have a right to participate in decisions that affect our daily lives.



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- Find opportunities to let community members know how valuable their contributions are and give back when you can (Hold events and meetups, workshops, webinars, make sure they're included, prizes, etc).

Bring people into every stage of the process.

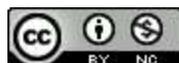
If you are seeking the deepest buy-in and engagement of your base in the effort, then it is worth involving them in the creation of the crowdsourcing exercise throughout the process.

Case study: Here is a detailed account of how the Roosevelt Institute built their process and involved stakeholders every step of the way

The writing of the [Next Generation Blueprint](#) document started with engaging stakeholders around the very notion of the document being a good idea. This happened via a series of back-and-forth exchanges of information between groups of Roosevelt stakeholders and Roosevelt staff. Everything in the document, including our eventual thesis, came from spaces built with our stakeholders, and the result was a high degree of buy-in throughout the student network.

The process started with a group of twenty-two alumni and students who were already handpicked as super-users. They had demonstrated a long-term dedication to and interest in Roosevelt's work. To help guarantee that the early idea-creation phase never became completely open ended, participants were given an initial set of readings, which included a paper that had been written by Roosevelt thinkers. Discussion around this document, *Rewriting the Rules of the American Economy*, gave rise to the eventual thesis.

With an initial thesis set, Roosevelt turned to the entire network of students. Using an online survey, Roosevelt recorded students' priorities vis-à-vis a series of different issue areas. Questions were designed to get both objective rankings of and subjective opinions on seven different policy areas. The survey was designed with assistance from the original steering group and then forwarded to the entire network.



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Using this data, Roosevelt staff built discussion groups of student and alumni experts in the top three issue areas. That meant creating spaces for feedback: guided two-hour video calls organized around education, economic development, and human rights, in which students and alumni reacted to the survey results and sketched the framework for concrete policy recommendations that accomplished the lofty goals put forward by the survey.

The iterative process continued with staff writing up the conversations and the same groups meeting again to critique and improve the product.

Share ownership of crowdsourcing outputs

Part of the unspoken code of public participation is that if you are asking for donated concepts and content, then that crowdsourced material should be considered shared intellectual property that is made available to the entire base of supporters who participated.

Here are some thoughts on this from [OpenMedia](#)

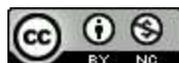
- People in our society have been told that they do not have control over decisions that govern our society. Our communications and interaction with our community should reinforce a sense of agency, power, and collective ownership.

Tricky parts + fixes

One of the biggest pitfalls here is opening the gates to input too widely and ending up with a huge database of random ideas and input that you can't make sense of or use strategically.

Steve from Open Media suggests the following:

- Frame the parameters of the input clearly. If you want to talk about government surveillance only, then be clear that you aren't looking for input on Facebook's monitoring of consumer behavior. Be clear and prescriptive.



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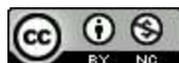
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He also recommends seeking specialized help when writing up formal reports that draw on crowdsourced input if the hope is for it to be taken seriously by decision-makers. He observes that all campaigners don't necessarily have great report-writing skills.

Another fix, suggested by Alan who worked with the Roosevelt Institute, is designing the ASK with a set of stakeholders, from the very beginning. People get that we've got to be narrow, so making them vote on only a few things, or be a part of the narrowing and honing processes means that your decision of focus points will ring true to the people you then need to weigh in.

Michael Hoffman from GatherVoices has the following observations on challenges and solutions specific to sourcing User Generated Content (UGC):

- Most people watch and don't create unless they have a good reason to, so the challenges to UGC start with the motivation and the messaging. Tell me why I should care? Tell me what difference it will make? Tell me why this is a central ask as part of a campaign? Show me how others are doing it. Alan Smith notes here that if you explicitly make your supporters the 'figureheads' of collective creation, they will be motivated by this attention to contribute.
- There are a thousand ways to deliver content and so when you just ask someone for content they are likely to give you something that doesn't fit with that you wanted. It will be too long or too short and it won't say the things you need them to say. This is true of text or photos or video. For example, you may need someone to mention an advocacy target or specific legislation and if you aren't prompting them to do so the otherwise great content would be useless to the campaign.
- That is why we create forms for text, but have more challenges with forms for video. For video specifically, there are choices of orientation (vertical, horizontal or square) and of quality level. And, unless you specify a way to deliver the content, you are liable to get a mix of emails, Dropbox files, YouTube links and assorted other delivery methods which are likely to be incompatible with each



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other and create a lot of management work for the campaign.

Further resources

For a deeper dive into the nuts and bolts of crowdsourcing and User Generated Content, we recommend the following:

Articles:

- [Great writeup of the Roosevelt Institute's Next Generation Blueprint crowdsourcing project](#)
- [Open Media's Crowdsourcing Principles](#)
- [Open Media's Crowdsourced Report: Our Digital Future](#)
- [Stanford study of political crowdsourcing](#)
- [Global Solutions Networks overview of crowdsourcing applications](#)
- [MobLab article on crowdsourcing by Greenpeace Germany](#)
- [SSIR piece on LGBTQ movement crowdsourcing campaign](#)
- [Update piece on Iceland's crowdsourced constitution](#)

Who can help with this?

Providers, consultants, trainers....

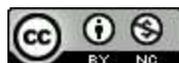
[NetChange Consulting](#) (consultants, trainers)

[Hattaway Communications](#) (consultants, agency)

[GatherVoices App](#) (app that makes it easy for supporters to submit their own videos for campaigns)

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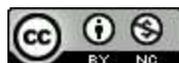
Blueprints for Change

[Steve Anderson](#), founder of [OpenMedia](#), who have generously made public many of their learned experiences on crowdsourcing for advocacy. Here are their own participant credits: *Thanks to Reilly Yeo who was involved in our crowdsourced processes in our early work as well as the [Crowdsourcing Masterclass](#) sessions that she taught with our founder Steve Anderson. Thanks also to community engagement specialist [Dave Meslin](#), Soledad Vega, and the entire OpenMedia team and collaborators past and present.*

Content was also provided by [Michael Hoffman](#) from [GatherVoices App](#), [Mobilisation Lab's crowdsourcing articles](#) and [Doug Hattaway's](#) account of the [Our Tomorrow campaign](#), [Alan Smith](#) and the [Roosevelt Institute's Next Generation Blueprint project](#).

This guide was prepared and reviewed by:

[Steve Anderson](#), [Tom Liacas](#), [Alan Smith](#)



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