



Feature Summary: Local Advocacy

Module: Advocacy

Release: Winter 2011

Document Owner: Michelle Shefter

New Terms or Concepts

District Matching –*Matching a constituent to their individual district or ward in a county or city. This enables Convio to identify the constituent's individual representative on a County or City Council and to send the constituent's messages to only their councilmember and not all councilmembers for alerts that target their council.*

Overview

Local Advocacy will now be facilitated with the addition of over 48,000 officials of county and municipal governments. These officials include both elected leaders and other decision makers like city managers. This data covers over 3000 counties and 3500 cities in the US.

In release that will ship in Spring 2011, Convio is also planning to offer constituent matching at the district level for 10-20 of the largest cities in the US, based on population. This will enable constituents in cities like DC and New York to be matched to their individual councilmembers. Over time, we plan to offer district matching for up to 200 cities and counties.

Key Features & Benefits

Features

- Ability to target alerts to more than 48,800 county/municipal officials
- District matching for 10-20 cities initially, and growing to ~200 over time
- New Constituent 360 Field for Municipality
- New Constituent 360 Groups for Municipal Residents With MultiCenter, centers can be restricted to one or more counties or municipalities

Benefits

- Ability to perform advocacy campaigns at the local level
- Easier email targeting and conditional content for constituents at the local level.

Use Scenarios

Organization Targets a Local City Council (where district matching is available – *planned for release in Spring 2011*)

- The American Health Society (AHS) follows decision making at the local level. The New York City Council is performing an annual review of the NY City Budget and considering a cut to funding for city-wide public health clinics. AHS wants to mobilize their constituents to protect the funding for these clinics.

Ryan, an administrator for the AHS configures an alert that targets the NY City Council and the Mayor of NYC. He selects the NY City Council as the target of his alert in the Target Selection Interface and specifies that all messages should be delivered by email/webform. In order to drive activists to his alert, Ryan then configures an email to be sent to constituents who live in New York City by selecting the New York City group in municipal residents. Constituents are sent to take action on the alert; when they click the send message button, their message is sent **to their individual council member** and the Mayor.

Organization Targets a Local City Council (where district matching is not available)

- The American Health Society (AHS) follows decision making at the local level. The Montgomery County, MD Council is performing an annual review of their budget and considering a cut to funding for health education classes in the county schools. AHS wants to mobilize their constituents to protect the funding for these classes.

Ryan, an administrator for the AHS configures an alert that targets the Montgomery County Council and County Executive. He selects the Montgomery County Council and County Exec as the targets of his alert in the Target Selection Interface and specifies that all messages should be delivered by email/webform. In order to drive activists to his alert, Ryan then configures an email to be sent to constituents who live in Montgomery County, MD by selecting the Montgomery County group in county resident's category. Constituents are sent to take action on the alert; when they click the send message button, their message is sent **to all council members** and the county executive.

Considerations for Clients

- When targeting officials in cities/counties where district matching is not available, constituents will be matched to the city or county and alerts that target the full council (or council equivalent) will be sent to all members of the council. If a 2-step alert is configured, constituents would be able to select their individual council member to receive the message.
- When targeting officials in cities/counties where district matching is not available, only constituents who live in the county/city will be able to take action
- When targeting officials in cities/counties where district matching is available, constituents will be matched to their individual representative on the council and constituent matching will be enforced – meaning non-constituents will not be able to send messages to officials who do not represent them

Feature Configuration

The Local Data feature is available for an additional fee. When you purchase local data, Convio will configure your site; there is no extra configuration that needs to be done.

Using Local Data

Using local data in Action Alerts

In the first User Story above, AHS wants to drive its constituents to respond to an action alert that targets the New York City Council.

1. To create the action alert, click **Advocacy > Action Alert**.
2. Click **Create Alert**. The Create Action Alert page displays.

3. In step 4, **Select Targets**, click **Add Targets**.

Advocacy

Action Alerts

[Action Alerts > test](#)

- Identify Alert
- Advanced Options
- Alert Message
- Select Targets**
- Select Contact Fields
- Include Questions
- Configure Autoresponder
- Thank You Page Options
- Design Alert
- Configure Pages
- Preview Alert
- Publish Alert

1. Select Targets:
Select the targets for this alert.

[Create Custom Target](#) [Review Legislator Contact Status](#)

Name	Title	Party	Representing	<input type="checkbox"/> Email / Webform	<input type="checkbox"/> Fax
White House					
Barack Obama	The President	DEM		<input type="checkbox"/>	<input type="checkbox"/>
U.S. Congress					
US Senators				<input type="checkbox"/>	<input type="checkbox"/>
US Representatives				<input type="checkbox"/>	<input type="checkbox"/>
State Officials:					
Select a State					
Governors: All				<input type="checkbox"/>	<input type="checkbox"/>
State Senators: All				<input type="checkbox"/>	<input type="checkbox"/>
State Representatives: All				<input type="checkbox"/>	<input type="checkbox"/>
Added Targets					

[Next](#) [Save](#) or [Cancel](#)

Add Targets

4. In the **Add Targets** window, click **Municipal Officials > New York > New York > Municipal Council**.

Advocacy

Action Alerts

[Action Alerts > test](#)

- Identify Alert
- Advanced Options
- Alert Message
- Select Targets**
- Select Contact Fields
- Include Questions
- Configure Autoresponder
- Thank You Page
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- Configure Pages
- Preview Alert
- Publish Alert

Add Targets

[Browse](#) [Search Results](#) [Search](#)

			Selected
Mississippi	New Rochelle	Municipal Council	
Missouri	New Windsor	Michael R. Bloomberg	
Montana	New York	Patricia E. Harris	
Nebraska	Newburgh	Raymond W. Kelly	
Nevada	Newburgh		
New Hampshire	Niagara Falls		
New Jersey	Niskayuna		
New Mexico	North Castle		
New York	North Greenbush		
North Carolina	North Tonawanda		
North Dakota	Ogden		
Ohio			

[<< Scroll Left](#) [Scroll Right >>](#)

[Ok](#) or [Cancel](#)

Added Targets

[Next](#) [Save](#) or [Cancel](#)

Add Targets

- Select the names of all of the City officials you would like to target
- Click **OK**.
- Complete the action alert steps and publish.

Using local data used in the Find Representatives component

When you add the Find Representative component to a site, constituents have access to a new “Local Data” tab.

Elected Officials: California, 94901

If 94901 is not your correct ZIP code, please re-enter it below:

94901

Find Officials

Show All Federal California **Local**

 **Barack Obama**
President (D)
Web: [Home Page](#)
Email: [Contact Page](#)
Phone: (202) 456-1111
Fax: (510) 225-9362
Address: The White House, 1st Floor, West Wing
1600 Pennsylvania Avenue, NW
Washington, District of Columbia 20500

New Fields in Cons360

Notice the new field at the bottom of the screen for Municipality

Advocacy Information

Congressional District (Automatic):	Congressional District (Manual Override):
State Senate District (Automatic):	State Senate District (Manual Override):
State House District (Automatic):	State House District (Manual Override):
County (Automatic):	County (Manual Override):
County District (Automatic):	County District (Manual Override):
Municipality (Automatic):	Municipality (Manual Override):
Municipal District (Automatic):	Municipal District (Manual Override):