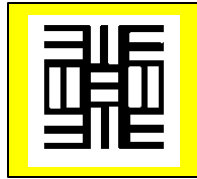


Knowledge Alliance

Research to Action in Education



“Communicating Knowledge for a Change”
7th Annual Knowledge Alliance Communicators Institute
June 13-14, 2007

Education Development Center
1000 Potomac St., NW, Suite 350
Washington, DC 20007 Phone: (202) 572-3700

Knowledge Alliance

Research to Action in Education

1718 Connecticut Avenue, NW Suite 700

Washington, DC 20009 (202) 518-0847 <http://www.knowledgeall.net/>

June 7, 2007

Dear Knowledge Alliance Communicators,

Welcome to the 2007 Knowledge Alliance Communicators Institute, “Communicating Knowledge for a Change”. By our unofficial count, this is seventh time we will be convening some of the finest communicators in the education R&D arena to share ideas, examine critical issues, and advance the collective cause of our trade association.

You will see in this year’s agenda that we aim to stretch our collective thinking about the future, share ideas that “sizzle” (and perhaps fizzle), and work on some of the new branding strategies for the trade association. We have an exciting group of presenters/discussants including our long time Communicators friends Jay Diskey and Dan Tobin. With our flexible, interactive format, there will be plenty of opportunity to share ideas and raise issues big and small with your colleagues.

I would like to thank the members of the planning committee—Rhonda Barton, Melissa Burns, Kim Gould and John Waters—who provided great ideas and insights for this year’s gathering. We all look forward to a dynamic, entertaining, and productive time together.

Until then,

Jim Kohlmoos
President

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AGENDA

“Communicating Knowledge for a Change”
2007 Knowledge Alliance Communicators Institute

Purpose

Examine and develop new ideas and directions for communicating in a dynamic education environment

Objectives

- Gain better understanding of current and future trends in education and educational communications.
- Share and examine effective approaches and practices
- Review and critique Knowledge Alliance’s new branding strategy

Wednesday, June 13

10:30-noon	Introductions, Presentation and Discussion “Policy, Politics, and Visions of the Future for Education and Knowledge Alliance” Jim Kohlmoos
Noon-1:00	Lunch
1:00-1:30	Short presentations “Ideas that Sizzle or Fizzle” <i>Allison Hausman</i> <i>Jackie Burniske</i> <i>Leslie Blair</i>
1:30-2:15	Presentation and Discussion “State of the Art and the Future Trends in Web-based Communications” Michael Cornfield, Ph.D. <i>Adjunct Professor in Political Management, The George Washington University, Contributing Editor, Politico.com, co-author of "Plays for the Presidency" blog, www.politico.com/playsforpresidency Vice-President for Public Affairs, Electionmall.com</i>
2:15-2:30	Break
2:30-2:45	Short Presentations “Ideas that Sizzle or Fizzle” <i>Bryan Goodwin</i> <i>Ann Kinder</i>
2:45-3:30	Presentation and Discussion “Communicating Educational Research” Mike Bowler <i>Director of Communications</i>

*Institute of Education Science
US Department of Education*

- 3:30-3:45** **Break**
- 3:45-4:00** **Short Presentations**
“Ideas that Sizzle or Fizzle”
Marsha Studebaker
Max McConkey
- 4:00-4:45** **Discussion**
“What’s It All Mean: Implications for Knowledge Alliance members”
Discussion among participants
- 4:45-5:00** **Short Presentations**
“Ideas that Sizzle or Fizzle”
Dan Tobin
Dave Wilson
Michelle Galley
- 5:00-6:00** **Break**
- 6:00-8:00** **Dinner and Presentation**
Nick’s Riverside Grill
3050 K St., NW, Washington, D.C. 20007 (202) 342-3535
“One Year Later: Perspectives from the Publishing Industry”
Jay Diskey
Executive Director, School Division
Association of American Publishers

Thursday, June 14

- 8:00-8:30** **Breakfast**
- 8:30- 10:00** **Work Session**
Review and discussion of Knowledge Alliance branding strategy
Logo Competition, Tag line, Web site development
- 10:00-10:30** **Break**
- 10:30:-11:30** **Work Session**
Ideas for the future
- 11:30- noon** **Review, De-brief, Adjourn**

Presenters

Mike Bowler

In his own words, ...” I’m the first communications director at IES, having started in November 2004. Prior to that I spent nearly 40 years in the newspaper business, much of it reporting and opinionating about education. I’m the retired education editor of the Baltimore Sun, where I worked nearly 35 years. (I also edited an op-ed page for eight years and wrote editorials for seven.) I was education editor of the Atlanta Constitution in the late 1960’s and also worked for the long-defunct Suffolk Sun (NY) and defunct-in-name-only White Plains Reporter Dispatch. The only hard work I’ve ever done is a year of teaching history and English at a public high school on Long Island. I’m a native of Montana. I have a B.A. in English from Columbia and an M.S. in Journalism from Columbia’s Graduate School of Journalism. I live in Catonsville, MD, with my wife of 44 years (next Friday).”

Mike Bowler
Director of Outreach and Communications
Institute of Education Sciences
U.S. Department of Education
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Mike Cornfield

Michael Cornfield, a political scientist, studies and advises on campaign politics, public affairs, and the internet. He is the author of two books on the subject: *Politics Moves Online: Campaigning and the Internet* (The Century Foundation, 2004) and *The Civic Web: Online Politics and Democratic Values*, co-edited with David M. Anderson (Rowman & Littlefield, 2003).

Together with Alan Kelly, Cornfield writes and manages “Plays for the Presidency,” a nonpartisan interactive blog that describes and prescribes the moves and counter-moves of the 2008 race for the White House. “Plays for the Presidency” runs on the ground-breaking political news site www.politico.com.

Currently Vice-President of Public Affairs for ElectionMall.com, a nonpartisan campaign technology company, Cornfield has worked with Rightclick Strategies, Buzzmetrics, and other firms in consulting capacities.

Cornfield is interviewed frequently about online politics by the press, and has lectured on the subject at colleges, universities, and professional conventions throughout the world. Among his many journalistic publications, he co-authored (with Lee Rainie) a review of the state of online campaigning in 2006 for the “Outlook” section of the *Washington Post*. He has contributed chapters to numerous academic anthologies, the latest being *The Sixth Year Itch: The Rise and Fall of the George W. Bush Presidency* (Larry J. Sabato, editor, Longman, 2007), and *Rewired Politics: Presidential Nominating Conventions in the Media Age* (Costas Panagopoulos, editor, LSU Press 2007). From 1999 until 2007, Cornfield wrote a monthly column for *Campaigns & Elections* magazine.

Cornfield is an Adjunct Professor at The Graduate School of Political Management (GSPM) of The George Washington University, where he has taught the core course on strategy and message development since 1994. While at the GSPM full time, he helped found its Semester in

Washington Program for undergraduates, and its Institute for Politics, Democracy, & the Internet.

Cornfield has served as a Senior Research Consultant to the Pew Internet & American Life Project (www.pewinternet.org), where he pioneered the study of political online advertising, blogs, and subscriber email, collaborated in survey research and analysis of political media use by citizens, and commented on related new developments in online campaigning.

Cornfield received his B.A. from Pomona College and his Ph.D. from Harvard University. Before coming to The George Washington University, he taught at the University of Virginia and the College of William and Mary. He lives with his wife Kathryn Mimberg and son Matthew in Arlington, Virginia.

Michael Cornfield, Ph.D.

Adjunct Professor in Political Management, The George Washington University

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Jay Diskey

Jay Diskey was named Executive Director of the Association of American Publishers' School Division in June 2006. In that role he directs and coordinates all of the division's activities including public policy development, advocacy, and communications. Prior to joining AAP, Diskey headed Diskey & Associates, a public relations and public affairs consultancy specializing in education and workforce development. Diskey has served as Communications Director for the U.S. House of Representatives' Committee on Education and the Workforce, and as Vice President of the education practice at Hager Sharp Inc., a Washington-based public relations firm. In the early 1990s, he was special assistant and press aide to U.S. Secretary of Education Lamar Alexander, having been Alexander's communications officer when he was President of the University of Tennessee. Diskey also worked as a journalist at *The Knoxville News-Sentinel* and *The Evansville Press*. A native of Fort Wayne, IN, Diskey holds a B.A. in philosophy and a master's degree in journalism from Indiana University.

Jay Diskey, Executive Director, Association of American Publishers' School Division,
jdiskey@publishers.org

Jim Kohlmoos

Jim Kohlmoos is the President and CEO of Knowledge Alliance (previously known as the National Education Knowledge Industry Association, NEKIA), a non partisan trade association dedicated to the effective use of research-based knowledge in education policy and practice. With three decades of experience in educational leadership and innovation in both the public and private sectors, Kohlmoos is charged with leading a national advocacy effort to expand support for evidence-based education and knowledge-based solutions in school improvement.

Prior to joining the Alliance in 2001, Kohlmoos was a vice president of Implementation Group, where over a two- year period as vice president he built an extensive bi-partisan government relations practice in elementary and secondary education. From 1993 to 2000 Kohlmoos served at the U.S. Department of Education as both a Deputy Assistant Secretary of Elementary and Secondary Education and as a Senior Adviser and Special Assistant. He also served on the

Presidential Transition Team in 1992. From 1977 to 1993, he worked at the Close Up Foundation first as an instructor and director and then as vice president.

Kohlmoos began his professional career in education in 1971 with the U.S. Teacher Corps in Salinas, CA. He subsequently served as a teacher trainer with the Peace Corps, which took him to Malaysia for three years.

Kohlmoos holds a baccalaureate in history from Stanford University (1971), plus teacher credentials from the University of California. He has completed graduate courses at Johns Hopkins University, George Washington University, and the University of California at Santa Cruz. A native of California, Kohlmoos resides in Arlington, VA, with his wife and two adult children.

Jim Kohlmoos

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About Knowledge Alliance

Knowledge Alliance

About the Alliance

Knowledge Alliance (formerly known as NEKIA) was founded in 1997 as a non-profit, non-partisan strategic alliance to address the increasingly urgent need to apply rigorous research to persistent educational challenges facing our country's schools. Composed of leading education organizations, Alliance members are involved in high-quality education research, development, dissemination, technical assistance and evaluation at the federal, regional, state, tribal, and local levels. The Alliance works closely with the US Congress, US Department of Education and other federal agencies in advocating knowledge-based policy for innovation and improvement in education.

Our Mission

Knowledge Alliance's mission is to improve k-12 education by widely expanding the development and use of research-based knowledge in policy and practice.

We believe that the effective use of research-based knowledge is essential to increasing student achievement and closing achievement gaps and should be a central organizing concept for the education reform efforts at all levels. We envision a new knowledge era in education policy and practice that focuses on the effective use of research-based knowledge to achieve successful and sustainable school improvement.

Our Guiding Principles

1. **Provide leadership in transforming education to prepare young people for life, work, and citizenship in the 21st Century.** We pay special attention to students who traditionally have been underserved due to race/ethnicity, poverty, first language, disability, or other factors.
2. **Conduct and apply high quality research to identify and solve educational problems.** We are particularly concerned about finding answers to enduring dilemmas that demand new and innovative solutions.
3. **Advance research and development as the driver of change in education as it is in other arenas.** We educate policy makers, practitioners, and the general public about the need for research-based solutions to educational problems.
4. **Apply industry-accepted standards for research and evaluation methodology.** We believe that the research methods should be appropriate to the nature and scale of inquiries.
5. **Involve stake holders in their work.** We connect with other communities and individuals that are interested in knowledge development and use, including those with new and different voices.
6. **Assure both scientific rigor and relevance.** We believe each are important in addressing educational problems and enduring dilemmas.
7. **Recognize that knowledge development is cumulative.** We believe in the frequent review of findings to confirm, build on, and refine what is currently known.
8. **Transform research into practice.** We are organizations that are flexible and adaptive to changing contexts. We design tools, programs and services that put knowledge to use.

Knowledge Alliance

Our Collective Capacity

Collectively, Alliance members form a dynamic and powerful community of researchers, educational developers, service providers, and entrepreneurs who are addressing the most urgent education problems in the U.S. and abroad.

Essential Capabilities for Transforming Education—Alliance member organizations are national leaders in education. They have the essential capabilities to transform educational practices and tools. They conduct research, develop quality education tools, and provide vital technical assistance and professional development services. Alliance members have extensive dissemination activities efforts directed at educators and policy makers. Many of the members also conduct experimental/quasi-experimental research, and provide policy analysis services.

Expertise in Every Critical Education Issue—Alliance members conduct work in nearly 50 topical areas spanning the education spectrum from early childhood to post-secondary education. The area in which most of the members conduct work is school reform and in areas emphasized by No Child Left Behind – teacher quality, accountability, educational standards, data-based decision making, and reading. Among the other topical areas in which members work are after-school, charter schools, curriculum, English language learners, gifted and talented, math/science, leadership, rural education, school safety, and technology.

Huge Capacity for Powerful & Scalable Effect—Revenue for Alliance members totaled nearly \$500 million in 2003. Collectively, they employ more than 3,100 of the nation's best researchers, trainers, and analysts.

Nationwide Reach to Every School in Every State—The reach of Alliance members extends to every school in each of the nation's 15,000 school districts.

Extensive Experience Abroad—In recent years, Alliance members have also provided services to over 100 foreign nations including Australia, Brazil, China, Egypt, Ghana, Guatemala, Honduras, India, Malaysia, Netherlands, Nigeria, Norway, Pakistan, Portugal, Senegal, Tanzania, Thailand, Yemen, and Zambia.

Dynamic Vision for a Changing World—Alliance members continually refine and build new capacities to help meet the needs of educators and policy makers. Among the capacity areas most frequently cited for development are experimental/quasi-experimental research and evaluation; professional development; consultative services/technical assistance; policy analysis and assessment; and evaluation.

Knowledge Alliance

2007 Membership

Academy for Educational Development
Washington, DC

AdvancED
Decatur, GA

American Institutes for Research
Washington, DC

Center for Equity and Excellence in Education** George Washington University
Washington, DC

Center for Research on Evaluation, Standards and Student Testing UCLA, Los Angeles, CA

Center for Research in Human Development and Education** Temple University
Philadelphia, PA

Center for Social Organization of Schools
The Johns Hopkins University Baltimore, MD

CNAC's Education Center
The CNA Corporation Alexandria, Virginia

The Collaborative for Teaching and Learning** Louisville, KY

College of Continuing Education**
University of Oklahoma Norman, Oklahoma

College of Education
Penn State University, University Park, PA

The Education Alliance**
Brown University Providence, RI

Education Development Center
Newton, MA

Edvantia (formerly AEL)
Charleston, WV

Learning Point Associates
Naperville, IL

Metro Center for Urban Education**
New York University New York, NY

Mid-Continent Research for Education and Learning (McREL) Aurora, CO

National Clearinghouse for Education Facilities** Washington, DC

Northwest Regional Educational Laboratory (NWREL) Portland, OR

Pacific Resources for Education and Learning (PREL) Honolulu, HI

The Reading Recovery Council of North America** Worthington, OH

RMC Research Corporation
Portsmouth, NH

SERRC**
Juneau, AK

Teachers College
Columbia University New York City

SERVE
University of North Carolina Greensboro, NC

Southwest Educational Development Laboratory (SEDL) Austin, TX

WestEd
San Francisco, CA

WGBH Public Television**
Boston, MA

****affiliate members**

Knowledge Alliance

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CNA Education Center

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Northwest Regional Educational
Laboratory

Reading Materials

Suggestions from our Branding Consultants

Pre-reading suggested by Mike Cornfield

MEMORANDUM

DATE: April 2, 2007

TO: National Education Knowledge Industry Association

FROM: Rodney Ferguson, Lipman Hearne
Patrick Riccards, Lipman Hearne

RE: New NEKIA Identity Rollout Strategy

As the National Education Knowledge Industry Association (NEKIA) looks to roll out its new organizational name and vision, there are a number of specific action steps that must be considered. Once NEKIA has agreed on a new name and brand and prepares to unveil it, the organization must agree on both the timing and action steps necessary to roll out the organization's new identity.

TIMING

Assuming NEKIA reaches agreement on its new name at the April 9 board meeting, there are three timing options for publicly announcing the group's new name:

Option One: Immediate

Often, an organization wants to quickly announce their change in name. There is generally great internal excitement for the new brand, and members are eager to discuss the change and promote the new direction of the organization. An immediate announcement takes advantage of that energy, reducing the "lame duck" period for the old organization.

The drawback to this approach is organizational preparedness. An immediate announcement makes it difficult to provide a seamless transition, including signage, letterhead, business cards, etc. It also requires significant manpower immediately, to ensure that all key stakeholder audiences and individuals learn of the shift at approximately the same time.

Option Two: Start of the School Year

Many education organizations will look to make significant announcements at the fall, timed to coincide with the start of the school year and a rediscovered interest in education issues from the media and key stakeholders. A fall approach helps NEKIA to take advantage related education news coverage, allowing appropriate media outlets to note the name change in stories related to education research.

There are a couple of downsides to this approach. First, a name change itself is not a news story, and waiting to announce to take advantage of media interest may prove disappointing. Second, with so many education-related announcements unveiled in

September and October each year, there is a chance the NEKIA naming announcement could get lost in the crowd.

Option Three: January 2008

The final option for announcing NEKIA’s new name and brand is the start of the new calendar year. Such a choice allows the organization to start the new year with a new identity, engaging in the full FY2009 budget and appropriations process under its new moniker. It also allows the organization to make all of the necessary changes – including those to logo, letterhead, signage, website, and print materials – before announcing the new name.

The downside to this approach is that there is a significant amount of time between now and then, allowing for the new name to “leak” before the organization was prepared to announce it. Such timing may also cause some NEKIA members to rethink the change entirely.

Timing Recommendation

Based on the above positives and negatives, we recommend that NEKIA plan to enact either Option Two or Option Three, depending on available manpower resources. NEKIA only has once opportunity to roll out its new identity, and it will be important to have all of its materials, messaging, and branding aligned. Ideally, the day the announcement is made, NEKIA would launch a new website reflecting both a new name and the renewed mission and vision.

ROLLOUT ACTION ITEMS

A. Obtain Web Domain Addresses

In advance of the public name change, NEKIA should immediately obtain any web domain addresses they may choose to use for the newly named organization. Some possible names (such as www.knowalliance.org) can be acquired directly through traditional web domain companies. Other names (such as www.knowledgealliance.com or www.knowledgealliance.org) would need to be acquired from the individual or organization that currently owns that name, but is not using it. Hopefully, such acquisitions can be made for a nominal fee.

After NEKIA has purchased all relevant names it may choose to use, it can decide on the primary web domain address it will use for the new organization. All other acquired addresses can then be pointed to that new address.

B. Address Trademark Issues

NEKIA staff will need to clearly document when they start publicly using the new organizational name, in preparation for a filing with the U.S. Patent & Trademark Office. Following approval of the new name, NEKIA should file with the Patent Office an intent to trademark the new name. This will protect it from use by others, and set up NEKIA as

the primary holder of that name. In the future, NEKIA would then want to engage a lawyer to finalize an official trademark application to protect its name, logo, and overall brand.

C. Develop New Logo/Organizational Brand

Following the approval of a new name and tagline, NEKIA should begin developing an official logo for the organization. This would include an icon that would be synonymous with NEKIA as it moves forward. This new organizational brand would be included on all future public materials, and would be part of NEKIA's trademark application.

D. Revise Letterhead/Business Cards/Signage

Armed with a new name and a new logo, NEKIA would need to redesign all of its public materials – such as letterhead, business cards, signage, etc. All materials would reflect the organization's name, tagline, icon, and color palette. NEKIA would want consistency of brand across all of its public materials.

E. Revise Website

Initially, NEKIA will want to change all naming references and logos on its website. This would be done in advance of the public name change. Following that public name change, NEKIA can begin an overhaul of all content on the site. To start, it would just need to remove all references to NEKIA and replace them with the new name.

F. Revise Existing Brochure/Public Information

Similar to the revision to the NEKIA website, the organization will need to revise its existing brochure to reflect the new name and logo. Again, the content can remain until print product revisions are undertaken. But the revised look of the brochure should be ready for dissemination.

G. Prepare Announcement Media Release

NEKIA should prepare a media announcement unveiling the organization's new name and tagline and reminding readers of the organization's mission and principles. The name change should be described as a sign of the continued evolution and maturation of the organization, with the new name and brand reflecting NEKIA's growth and focus on future activities. NEKIA should not expect to get media coverage from this announcement itself; the release is used to ensure that future mention of NEKIA is accurate and that the media remember to think of NEKIA when covering education research or knowledge industry stories.

H. Notify Partners of Name Change

Prior to the public announcement of NEKIA's new name, organizational officials should notify organizations and individuals it has partnered with in the past. For those organizations that link to NEKIA through their website, they will be asked to make the appropriate changes, and will be provided the new organizational logo for inclusion on their site.

I. Publicly Unveil Name Change

Once NEKIA is ready to announce its new name and brand, it should disseminate its media release to:

1. All relevant national and education trade media
2. All NEKIA member organizations
3. Key education organizations, policy organizations, think tanks, and philanthropies
4. Members of Congress and appropriate Congressional committees
5. Officials at the U.S. Department of Education
6. Key thought leaders and influencers in the education community
7. NEKIA's complete contact database

One-on-one media follow-up should occur with Education Week and Education Daily, among others. Lipman Hearne does not believe a media "event" is necessary for the name change.

J. Prepare the Office

On the day of the public announcement, NEKIA will need to make sure that the new website has gone live, all voicemail boxes have been changed, and any public use of the term NEKIA has been revised to reflect the new organizational name. Also, the new icon should be affixed to any signage on the building and/or office.

K. Make Necessary Revisions with Web Search Engines

After the new website has been launched, NEKIA should ensure that all Internet search engines (including Yahoo and Google) have been notified of the change and that the new site has been search engine optimized so interested parties looking for NEKIA will still be able to find the new website.

L. One-on-One Follow-up with Key Hill, Administration Contacts

Following the public announcement, it will be important for NEKIA officials to follow up one-on-one with key contacts on Capitol Hill and at the U.S. Department of Education. These meetings should be instigated because of the name change, but should be used to remind key parties of NEKIA's mission, principles, and plans for the future, particularly with regard to reauthorization. Talking points should be developed that convey NEKIA's new sense of mission.

M. Launch of New Website

Concurrent to the development of new print materials, NEKIA officials should redevelop the organization's website, based in part of Lipman Hearne's recommended web strategy. As the website is NEKIA's primary informational tool, the launch of the new website should be a top priority for this year.

N. Preparation of New Organizational Public Materials

Following the launch of the new name and brand, NEKIA should begin developing a portfolio of new print materials that would be used to educate the public and key audiences. Specific materials are detailed in Lipman Hearne's recommended print materials strategy.

We recognize we are recommending a great number of action steps, but we believe that all of these activities are necessary to successfully launching the organization's new name and identity. Lipman Hearne is eager to assist NEKIA with this launch, and will do whatever is necessary to ensure the success of the public name change.

MEMORANDUM

DATE: April 2, 2007

TO: National Education Knowledge Industry Association

FROM: Rodney Ferguson, Lipman Hearne
Patrick Riccards, Lipman Hearne

RE: NEKIA Web Site Strategy

As the National Education Knowledge Industry Association (NEKIA) prepares to improve its organizational identity and role in the field of educational knowledge acquisition, its website plays an essential role in the communication of information and promotion of the organization. The unveiling of a new name is likely to drive expanded interest in NEKIA's work, with the first stop being the website.

To assist NEKIA with this effort, Lipman Hearne has analyzed the current website, providing specific ideas on how to improve the current site and further align it with the mission and direction of the organization. Our specific recommendations follow.

NEKIA Web SWOT Analysis

Lipman Hearne reviewed all components of the current NEKIA website (www.nekia.org) with a specific emphasis on the publicly available pages. Those pages are NEKIA's gateway, and tell the organization's story to those both familiar and unfamiliar with NEKIA. This review was conducted in tandem with a review of related websites, member organization websites, and education sector sites. From there, we developed an analysis of the NEKIA website's Strengths, Weaknesses, Opportunities, and Threats.

Strengths

- Comprehensive information
- Regularly updated
- Ever-present content menu
- Consistent NEKIA brand on every page
- Pages are "printer friendly"

Weaknesses

- Text heavy
- Information is not prioritized
- Multitude of fonts and colors
- Appears as an "insider" site for those involved with NEKIA
- Does not drive readers to contact NEKIA or get involved

Opportunities

- Utilize site to drive interest in membership
- Utilize site to promote upcoming NEKIA events, member events
- Align site with key programmatic goals, clearly demonstrating what NEKIA is doing in public policy, knowledge infrastructure, business development, industry leadership, and capacity building
- Enhance promotion of NEKIA members and their alliance

Threats

- Audiences unsure who this site is intended for
- Text-heavy home page could turn away readers
- Does not answer the “why NEKIA” question
- Unclear how NEKIA fits in the overall education policy/organization universe

Web Site Enhancement Recommendations

Based on our review of the NEKIA website and other related sites, we recommend a number of improvements and realignments to the NEKIA site. Currently, NEKIA is providing a significant amount of information on its site. Our recommendations are designed to assist NEKIA in:

- Increasing stakeholder audience for education knowledge
- Promoting the organization and its benefits to potential member organizations
- Using the site as a teaching tool for policymakers and key influencers
- Creating a common language, look, and alignment for all NEKIA materials
- Establishing the NEKIA website as its gateway information source, the primary marketing and education tool of the organization

Following are our specific recommendations for enhancing the NEKIA website:

I. NEKIA Web Visual Identity Recommendations

In looking at the visual identity NEKIA has established through its website, Lipman Hearne recommends the following:

A. *Establish a Core Color Palette*

Currently, NEKIA uses a host of colors and fonts on its website. Moving forward, we recommend establishing a clear palate of NEKIA colors (likely tied to a new NEKIA logo). These colors would not only be used on the NEKIA banner at the top of each page, but would be reflected in the navigation buttons, headlines, and other visual depictions.

Similarly, NEKIA should use a consistent font for all text on the website (Garamond is commonly recognized as the strongest font available) and all text should be provided in

black. Gray text should only be used if it is specifically intended to draw distinction to the copy.

B. Establish a NEKIA Logo and Brand

NEKIA needs an iconographic identity that is the anchor for all printed and web information. With the adoption of a new name and tagline, NEKIA needs to develop a logo and icon that similarly represent the mission and vision of the organization. This logo would be populated throughout the site, and would serve as a future identifier for all NEKIA information. This logo would incorporate the organization's core color palate, and would include the organizational name and tagline.

C. Key In On Mission Statement

NEKIA has invested significant time and effort into developing its mission and guiding principles. These guiding principles (in an abridged version) should be the second thing (after the logo) any visitor to the site sees. We want to remind visitors WHY they should be reading the information at this website.

D. Align Menu Buttons With Guiding Principles

As we focus visitors on the NEKIA guiding principles, we should provide them a clear map to information on each of the core areas NEKIA has prioritized. Some current menu items (such as contact us, news, photos, etc.) can be relocated to a top or bottom page menu. We want visitors drawn specifically to the cornerstone of NEKIA's work and its value to its members.

E. Shorten Page Length

Research shows the majority of individuals only read the information found in the first screen shot's worth of text. That being the case, NEKIA should shorten much of the content on the site, highlighting key information and driving visitors to contact the organization for additional information. In some cases, we may want to explore the creation of submenus in key menu categories (see below in navigation recommendations).

II. NEKIA Web Navigation Recommendations

In looking at the web navigation of the NEKIA website, Lipman Hearne recommends the following:

A. Improve Information Organization

As we recommended above, the main NEKIA information menu (currently on the left side of the page) should align with NEKIA's core activities -- public policy, knowledge infrastructure, business development, industry leadership, and capacity building. Also included in that main menu should be an ABOUT US button, OUR MEMBERS button, and new JOIN NEKIA and UPCOMING EVENTS buttons (see below in web content).

Additional information, such as NEWS, CONTACT US, and a proposed PHOTOS, should be included as buttons along the top or the bottom of the page. Visitors are used to looking in those locations for such information, and it will provide a cleaner organization, by not providing a core menu of a dozen buttons.

B. Submenus

NEKIA should consider establishing some submenus in its core menu list. This will allow the organization to continue to provide a broad range of information and data, but to offer it in manageable bites. For instance, the OUR MEMBERS page, could become a MEMBERSHIP page, with sublists for “OUR MEMBERSHIP,” “VALUE OF MEMBERSHIP,” “HOW TO BECOME A MEMBER,” etc.

C. Tag Website to NEKIA

Currently, the website is identified as “Home” in its Internet tagging. This means that when the site is open in the browser or is saved to a Favorites list, it is not initially tagged as NEKIA. It is simply tagged as Home. Coding changes should be made to ensure it is always tagged with the organizational name.

D. Page-to-Page Navigation

Currently, the NEKIA site uses a wide variety of page fades and one moves from subpage to subpage (changing text left to right, right to left, emanating from center, etc.). We recommend a common transition between pages, so that viewers are not distracted from the content of the site.

E. Use of Java

As a visitor navigates between pages, he gets continues messages that Java is needed to view the applet. For the non-web-savvy, such warnings can cause individuals to leave sites, not knowing if they have Java or not. If the NEKIA site is redesigned, it should be coded to a level where the average browser will support it without such notifications or warnings.

III. NEKIA Web Content Recommendations

In looking at the web content of the NEKIA website, Lipman Hearne recommends the following:

A. Member Recruitment

In our review, one key piece of content that is missing is member recruitment. In addition to providing needed information, this website should serve as a marketing tool for the organization. As such, it should promote the good works of the organization, and make clear to visitors that their organization should be a member.

In addition to providing the list of member organizations, we recommend providing specific content on: 1) benefits of NEKIA membership; 2) levels of NEKIA membership (full or associate); and 3) how one becomes a NEKIA member.

B. Promotion of Events

The other key area not currently explored on NEKIA's website is conferences and events. Recognizing that NEKIA events are a future priority for the organization, we recommend a KNOWLEDGE EVENTS section that focuses on two areas. The first would be NEKIA-sponsored or organized events, providing a forward-looking calendar and backward-looking summaries of NEKIA events. The second would be a compilation of key conferences and events around the country, unrelated to NEKIA, that would be of interest to members and those involved in the education knowledge industry.

C. Shorter Content on All Pages

As we noted earlier, we recommend that NEKIA shorten the amount of text and data found on each individual site page. Ideally, page content should be no longer than a traditional screen shot. Where additional information is needed, every effort should be taken to create subpages to break up the text. The exceptions to this would be pages with lists of information, such as NEKIA members, press releases, etc. Remember, less is more. NEKIA's website should provide enough information to update its members, attract potential members, and educate key audiences. The ultimate goal of a website is to drive visitors to contact the organization itself. We want to learn who is relying on NEKIA for education knowledge information.

D. Catalog of Weekly Summaries

NEKIA does an impressive job of regularly updating its members through thought-provoking weekly summaries. We recommend a broader dissemination of these summaries. This can be accomplished through a subscriber-based distribution list and an online catalog of past summaries on the website.

E. Align Content with Principles

As noted above, all core content should make reference to NEKIA's core principles and should be aligned and written based on those principles. This will enable visitors to more quickly recognize and accept the primary activities of NEKIA and see how they are contributing to knowledge acquisition and education improvement.

F. Make Print Products Available Online

As NEKIA develops a portfolio of print products (brochures, white papers, etc.) it should make all materials available for download on the site as PDFs. This will reduce overall printing costs for such products, while establishing the NEKIA site as a central repository for knowledge industry information.

G. Expansion of Press Room

Press or media rooms are an important component for many websites. Not only do they direct media to the right information, but they are also used by non-media to more easily find the information they seek as well. We recommend expanding the current NEWS portion of the site to include information such as: 1) press releases; 2) links to news articles; 3) bios of NEKIA staff and board; and key contact information.

Conclusion

Overall, we believe that NEKIA has an incredible amount of information on its website, thus providing a real service to the industry as a whole. Once NEKIA has chosen its new name and identity, the first step will be selecting a domain name that matches that new brand. We are prepared to assist you in this effort. Additionally, as the organization continues to mature and expand, there are a series of cosmetic and content revisions it can pursue to better deliver that information and increase usage and interest in it. Lipman Hearne is prepared to assist you in this effort, particularly with the development of a NEKIA logo and the development of revised and new content.

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MEMORANDUM

DATE: April 2, 2007

TO: National Education Knowledge Industry Association

FROM: Rodney Ferguson, Lipman Hearne
Patrick Riccards, Lipman Hearne

RE: NEKIA Print Materials Strategy

As the National Education Knowledge Industry Association (NEKIA) prepares to improve its organizational identity and role in the field of educational knowledge acquisition, it needs to develop a portfolio of strong print products designed to supplement and contribute to its primary website. While the web is an essential communications vehicle, many in the education space continue to depend on print products and main sources of information.

To assist NEKIA with this effort, Lipman Hearne has analyzed NEKIA's current print materials, providing specific ideas on how to improve these documents and further align them with the organization's vision and its current website. Our specific recommendations follow.

NEKIA Print Product SWOT Analysis

Lipman Hearne reviewed NEKIA's full portfolio of print products. These documents serve as NEKIA's leave-behind following meetings and events, and tell the organization's story to those both familiar and unfamiliar with the organization. This review was conducted in tandem with a review of similar print products from other education research organizations. From there, we developed an analysis of the NEKIA website's Strengths, Weaknesses, Opportunities, and Threats.

Strengths

- Content rich
- Common graphical look
- Printer friendly (both in color and black-and-white)
- Consistent with website content

Weaknesses

- Text heavy
- No graphical elements
- Lengthy

- Limited portfolio of documents

Opportunities

- Relative blank slate for product development
- Core content is already available and agreed to
- Ability to align all print materials with website
- Ability to design all print products for primary distribution through website as PDFs

Threats

- Limited audience appeal
- Need to complement member publications without being duplicative
- Need to keep print product messages/content closely aligned with website
- Increased print portfolio could result in increased demand and increased costs

Print Product Improvement Recommendations

Based on our review of NEKIA’s current portfolio of print products, as well as the wealth of printed materials currently in the education research space, we recommend a number of improvements and new products NEKIA should explore. Currently, NEKIA is communicating primarily through its website. We do not intend to change that. But we do recommend some specific modifications to existing print product and a targeted portfolio of new products to supplement the NEKIA’s information reach and provide rich content for the website itself. Our recommendations are designed to assist NEKIA in:

1. Increasing stakeholder audience for education knowledge
2. Promoting the organization and its benefits to potential member organizations
3. Drive policymakers and key influencers to the NEKIA website for additional information
4. Creating a common language, look, and alignment for all NEKIA print and electronic materials
5. Supplement the NEKIA website with a strong portfolio of meaningful, targeted print materials

Following are our specific recommendations for enhancing the NEKIA print product portfolio:

I. NEKIA Print Materials Visual Identity Recommendations

In looking at the visual identity of NEKIA print products, Lipman Hearne recommends the following:

A. *Establish a Core Color Palette*

Just as we recommended with its website, should establish a clear palate of NEKIA colors (likely tied to a new NEKIA logo). These colors would be used on all print collateral, ensuring a common look and feel across print and Internet products.

B. Establish a Style Guide

NEKIA should establish a style guide, which would identify the fonts NEKIA uses in its products, how its logo is used, and how the organization's name and tagline is referenced in all key materials. This would ensure that all print products follow the same style guidelines, and that external audiences and NEKIA member organizations correctly use the NEKIA logo and identity in any third-party materials.

C. Establish a NEKIA Logo and Brand

Again, like the website, all NEKIA print products should share a common iconographic identity that is the anchor for all distributed information. This logo would be populated across all communications platforms, and would serve as a future identifier for all NEKIA information. This logo would incorporate the organization's core color palate, and would include the organizational name and tagline.

D. Use NEKIA Logo as a Core Design Element, But Not the Primary Focus

Ultimately, each NEKIA print product should share a similar look, so stakeholders know they are from the same family. But each product needs to have some distinction, preferably a eye-grabbing title or title graphic. Currently, NEKIA uses its logo as the anchor for its current print product. We recommend scaling back the size and placement of the logo. It would still be prominent on the cover of all print products, but would be secondary to the identifier for the specific product. This will reduce instances of audiences thinking they have already reviewed a specific product.

E. Enhance Graphical Elements

Currently, NEKIA's print products are almost exclusively text-driven. As part of the development of a NEKIA style guide, the organization explore a goal that one-quarter to one-third of each page of a print document provide some graphical depiction – chart, graph, logo, photograph, table, drop quote, etc. Doing so provides information in a more user-friendly format, drawing the reader's attention to key information or data.

II. NEKIA Print Materials Editorial Content Recommendations

Overall, we believe NEKIA's editorial content is strong. In looking at the editorial content of NEKIA print products, Lipman Hearne recommends the following:

A. Abridge Content

NEKIA's current core print product is nine pages long. To effectively communicate the mission and the role of the organization, NEKIA should develop a short one-pager identifying the core attributes and contributions of the group.

B. Audience-Specific Language

As additional print products are developed, NEKIA may want to explore tailoring key print materials for specific audiences. For instance, a one-pager on NEKIA's benefits would be slightly different for research organizations, for IHEs, and for policymakers.

C. *Results-Focused Language*

In today's No Child Left Behind environment, most in the education community are focused on results, rather than process. It is important for NEKIA to discuss both, demonstrating how NEKIA's advocacy and the work of its members is contributing to the overall improvement of public education in the United States.

D. *Align with Website*

Because the NEKIA website will remain the primary communications and information vehicle for the organization, it is essential that all print content align (both in tone and objective) with the content on the website. New editorial content for both mediums should be developed in tandem, with web content driving the process.

III. NEKIA Specific Print Product Recommendations

In looking at specific print materials NEKIA can develop to promote the organization, Lipman Hearne recommends the following:

A. *About NEKIA Brochure*

A short summary brochure detailing NEKIA, its mission, its guiding principles, and its members. This would be an abridged version of the document currently used by NEKIA ("Using Knowledge for a Change").

B. *Joining NEKIA Brochure*

A short brochure detailing the benefits of NEKIA to potential members. This document would be used as part of a NEKIA member recruitment effort.

C. *Primer on Education Knowledge Acquisition and Application*

A pamphlet defining key terms on the education knowledge industry and highlighting those federal programs that fund education knowledge efforts.

D. *Benefits of NEKIA One Pager*

A bulleted handout demonstrating the impact NEKIA and its members are having on improving public education in the United States.

All materials would be developed primarily for distribution through PDF, with the anticipation of limited run printing. Where appropriate, NEKIA should consider tailoring specific print products for each of its primary audiences.

Conclusion

Overall, we believe that NEKIA has an incredible amount of information on its website, thus providing a real service to the industry as a whole. Once NEKIA has chosen its new name and identity, the first step will be selecting a domain name that matches that new brand. We are prepared to assist you in this effort. Additionally, as the organization continues to mature and expand, there are a series of cosmetic and content revisions it can pursue to better deliver that information and increase usage and interest in it. Lipman Hearne is prepared to assist you in this effort, particularly with the development of a NEKIA logo and the development of revised and new content.

The Netroots Break Through **Online Campaigning in the 2006 Midterm Elections**

By Michael Cornfield

Americans encounter innovations in information and communication technology on a continuous basis, and the campaign trail is no exception. Computer power doubles roughly every 18 months, faster than the 24-month campaign cycle, guaranteeing that as Election Day nears politicians will trot out new ways of contacting voters. Voters find new ways of contacting politicians, too.

But the appearance of new software applications, digital devices, and the latest decimal pointed up grade does not guarantee political impacts. Some technologies just sit there, electorally speaking. For example, the mobile phone is now standard gear for living in the United States, with more than 207 million subscribers nationwide at the end of 2005, according to the Cellular Telecommunications Industry Association. Yet it was news in 2006 that Rick Santorum and John Edwards were experimenting with mobile. The directory of political consultants maintained by *Campaigns & Elections* magazine lists 23 firms under “Internet/Web site,” whereas “Mobile Phone” is not a category, and none of the 28 entries in the “Telephone Contact Services” category refer to “mobile services” as an offering.ⁱ

For a new technology to have an impact on campaign politics, three things must occur. First, the technical innovation must be adopted by voters, donors, or opinion leaders in their consumer lives, creating a sufficiently large user pool. The internet pool was certainly of ample size for 2006. An AP/AOL/Ipsos survey reported that, by the end of September 2006, as the campaigns entered their most intensive public phase, 70 million eligible voters had already gone to the internet for news or information about candidates and campaigns. A tenth of this online campaign audience pool had used a message board, chat room, or blog to participate in discussions about the elections, meaning that at least 7 million Americans were online campaign content generators (the survey did not ask about email or YouTube).ⁱⁱ

Second, campaigners must perceive and be able to implement a strategic utility for the innovation, creating an application which will serve their purpose. Here, the internet posed obstacles. A Pew post-election survey found that only 12% of the electorate, and 14% of registered voters, were contacted by email urging them to vote for a particular candidate.ⁱⁱⁱ As one commentator brightly observed, “If parties sent emails to 12% of the population, that pretty much means they have the email address of 12% of the population.”^{iv} The political world actually has slightly more email addresses, in as much as campaigns contacted 15% of the electorate in the presidential year of 2004, according to the Pew poll. But it is not as easy for campaigns to reach specific targets through email as it is to identify targets with computerized data.

Third, the rest of what goes into successful campaigns must be present: the right messengers delivering the right messages to the right people at the right times, creating a network of concerted activity between the user pool and the campaigners deploying the new application. Technology does not supply political intelligence, emotion, and willpower. Most people acknowledge this as a common sense truth. But in the heat of a race, when truths are in formation; from an observers' distance, where practical truths can be hard to see; and in the promotional materials of businesses, where truths blur with aspirations, the role of technology sometimes gets inflated.

Still, when the three conditions are met, new technology has a hand in political history. In the decade online campaigning has been in existence, this has happened several times at the statewide/national level. Reform Party candidate Jesse Ventura relied on email to become Governor of Minnesota in 1998; John McCain tapped an online gusher of money in the 2000 Republican presidential primaries; Howard Dean soared to prominence powered by a blog-centric network in 2003 before falling to earth in the 2004 Democratic Iowa Caucus. In 2006, it happened again, but the history-makers did not work on behalf of a single campaign. Instead, the change agents belonged to a political movement, one whose loosely affiliated participants reframed the national election agenda and had direct effects on dozens of Congressional campaigns. The name this movement gave to itself was "the netroots," a portmanteau word for internet grassroots. This essay reviews what the netroots did and how they did it.

Who are the Netroots?

The netroots were progressive activists with three primary focal points of organization: Moveon.org, the nation's foremost internet-based political action committee (PAC) and issue advocacy group; the successors to the Dean campaign, starting with the Democracy in America PAC and eventually encompassing the Democratic National Committee after Dean became its chair; and a constellation of blog sites, most notably MyDD (the DD stands for Direct Democracy) and DailyKos. Other netroots organizations of importance include the fundraising site ActBlue, the think tanks Center for American Progress and New Politics Institute, the online political consulting firms Blue State Digital and EchoDitto, and a weave of state-level blogs and organizations, such as ProgressOhio, ProgressNow (Colorado), and RaisingKaine (Virginia). It's hard to estimate the population of the netroots, given the inevitable overlap among the rosters of these groups. But a floor would be three million (Moveon.org's membership) and a ceiling would be fourteen million (the number of "online political activists" reported by Pew in January 2007).

A randomly sampled survey of the Howard Dean campaign database conducted in fall 2004 by the Pew Research Center reveals that although netroots people used new tools in new ways, many of them were not new to politics. Only 18% were under 30; 57% had worked in a presidential campaign before joining the Dean list. Compared with other Democrats, the Dean activists were "far wealthier, better educated, more secular,

and much less ethnically diverse....The activists overwhelmingly think of themselves as progressives (90%) and most describe themselves as patriots (80%). More than half (55%) call themselves fiscal conservatives.” Practically all of them (96%) strongly disapproved of President Bush’s job performance and (97%) voted for John Kerry in 2004; two-thirds of them donated money to Kerry. Nearly half (45%) said they kept up with people they met during the Dean campaign, with the median number of people met at fifteen. More than three-quarters (77%) said they went online several times a day.^v

Many Deaniacs were heading to blogs, of course. Jerome Armstrong and Markos Moulitsas, the founders of MyDD and DailyKos, respectively, wrote a netroots manifesto for 2006 entitled *Crashing The Gate*. The book articulates the netroots outlook and program. Relying appropriately enough on an internet metaphor, the two bloggers stated the central political problem facing the netroots as follows: “The Democratic Party has long since reached that point where it must be ‘refreshed’ –it is virtually impotent, yet self-satisfied, in the face of the havoc that Republicans are wreaking on our country.”^{vi} The netroots intended to put new political pages before the eyes of the American public.

Armstrong and Moulitsas dissected the Republican party into “corporate cons” (con as short for conservative, and a pun on prison con, alluding to corrupt officials and the business executives who bribed them for contracts and favorable legislation), “theocons” (religious conservatives), “neocons” (foreign policy unilateralists), and “paleocons” (anti-immigrant advocates). This ignoble association had produced a series of unpopular events, including the Iraq War, the interventions to stop Terry Schiavo’s death, the government response to Hurricane Katrina, and the scandals involving Representatives Tom DeLay, Duke Cunningham, and Mark Foley. But public disapproval with Republican policies and officials was not translating into support for Democratic proposals and candidates.

Armstrong and Moulitsas argued that Democrats were hamstrung by their dependence on corporate contributions, professional consultants, and single-issue interest groups. Democrats also lacked an equivalent to “The Republican Message Machine.” Liberals and Democrats consistently lost the talking points wars. Their ranks seemed more adept at satirizing than countering the catch-phrase of the day and the issue position of the week. To be sure, a party that does not possess the bully pulpit operates at a disadvantage in framing, spinning, and priming its arguments. But the Republican Message Machine had impeached President Clinton –with prominent parts played by TheDrudgeReport.com and Free Republic.com.

The netroots set out to fix the balance, relying on innovative applications of new media as well as imitative uses of what conservatives and Republicans were doing. They had precedent: the right had taken on a similar project beginning in the 1970s, developing alternative voices and conduits to the liberal Democratic “Establishment.” Netroots figures sought to raise money from small donors, something Republicans did quite well, notwithstanding their ties to the boardrooms. (ActBlue would collect and direct \$17 million to Democratic candidates in the 2006 cycle, while MoveOn.org chipped in another \$25 million.) They started to assemble a message machine of their own, replete

with policy advocates, media watchdogs, surrogate speakers, and public relations personnel. The netroots meant to match the Republicans issue frame by issue frame: stressing the war in Iraq instead of the global war on terror, stem cell research instead of Schiavo and abortion, income inequality instead of economic growth, corruption instead of obstruction.

The netroots worked out an electoral strategy for 2006 that pivoted on the idea of backing Democratic candidates even where they appeared to have no good chance of winning. This “fifty-state strategy” was controversial within the party. Some Democratic stalwarts maintained that funneling resources to a few candidates was the wiser course. Given the many advantages of incumbency and the tilted playing fields of gerrymandered districts, why not try to win where the odds weren’t so long? The argument came to the fore immediately after the 2004 elections in an intra-party skirmish that would mark the netroots’ first palpable triumph.

Special Elections

The netroots turned promptly from John Kerry’s defeat to the next available contest at hand, the mid-February 2005 selection of the next chairman of the Democratic National Committee. It was an appropriate race to advance the small donor/constant messaging/fifty-state strategy meta-agenda. Their favorite candidate (although not the only acceptable one; Simon Rosenberg hired MyDD principal Matt Stoller to blog the race) was none other than Howard Dean. Kerry, along with Democratic Congressional leaders Nancy Pelosi and Harry Reid, favored Iowa Governor Tom Vilsack. But Vilsack withdrew in the face of blogger criticism; a buzz-cloud of discomfiting facts and opinions similarly enveloped the candidacies of such other party regulars as former Congressmen Martin Frost and Tim Roemer.

As in Dean’s run for the presidency, his candidacy to become DNC chair received a promotional lift from a MoveOn.org online plebiscite. At a January candidates’ forum in California, hundreds of spectators gave Dean a standing ovation for saying that, even if he lost, Democracy for America would continue to fund grassroots campaigns and state chapters of the party. That inspired online journalist Chris Nolan to pose this rhetorical question: “If state-level leaders can draw on more than one piggybank for campaign help, as Dean is drawing on MoveOn.org's help for the chairmanship race, doesn't that weaken the DNC's authority?” Not electing Dean, in other words, would split the party. In the end, Dean won by unanimous voice vote. The politics of inside baseball had been altered; an organizational post was filled by 447 party regulars with the eyes of perhaps a million or more net-briefed donors, opinion leaders, and canvassers upon them.^{vii}

In the ensuing months, the netroots tuned into a sequence of special elections for Congressional seats. These contests maximize a unique asset of politics on the internet: since they are usually the only election nationwide on the day they are held, activists across the nation can easily follow and contribute to them, and their efforts can be effective even if they have never been in the locality in question. The netroots had mixed results backing such candidates as Paul Hackett in Ohio and Francine Busby in

California. Neither Democrat won, but the message machine had rumbled into gear. The local races were widely viewed as referenda on the performance of the Republican government.

The big question as the 2006 primaries began was whether the netroots could succeed in dozens of campaigns at the same time. New technologies were available for the task. The social networking sites MySpace and Facebook attracted interest, as did the aforementioned mobile phone. And then there was YouTube.

YouTube and the Video Revolution

YouTube's entrance into contemporary American life (it did not exist in 2004) had all the subtlety of a dam burst. What flowed through the cracks in the previous distribution system were all the videos ordinary people (as opposed to network programmers and news producers) wanted to broadcast and watch: videos about themselves and events they deemed important, clips from their favorite television shows, and videos which combined or "mashed up" elements of the home-made and professional. Karaoke-style lip-synching, dancing in front of green screens on which movie clips could be projected, citizen journalism, faux personal diaries waiting to be exposed as scripted soap operas –the genres emerged so fast it was as though they had been waiting for the mega-site to appear. A voluminous supply arose to meet a bounteous demand. YouTube registered over one hundred million viewings a day, with 65,000 new videos posted each day.^{viii}

The videos featured on the YouTube home page arrive there according to several routes. Some are chosen by an editorial staff, others come as the result of contractual arrangements with media partners and registered users, and traffic numbers generate a third pathway.^{ix} But prominence is not as crucial to the political utility of an online message as in the old media. For the index of YouTube is part of what makes it such a winning innovation, along with the ease of uploading and viewing. Anyone in search of a particular video can easily find it, and pass it along to others, by typing in the right key words. This raises the stakes of the message war. If your preferred key words (the name of a candidate; a buzz phrase symbolizing an issue position) can become known, thousands of internet users will search YouTube to see what the fuss is all about. From there to mass media visibility is a shorter step than the average individual with a camera had ever experienced.

YouTube and blogs went together splendidly. Bloggers quickly started inserting YouTube freeze-frames into their posts; this enabled them to comment about a wider variety of the latest media content, and more easily retain their readers after they watched a referenced video. The addition of popular videos to blogs elevated their already high listings on search engine return pages. This not only further increased blog traffic, but enhanced the possibility that a video would be referenced and excerpted on local and network television. Shorter steps for viewers translated into bigger influence for bloggers and, potentially, video makers.

One way to gauge YouTube's impact on the social and political mediascape is to revisit the big political video from 2004, the JibJab cartoon "This Land." The animated send-up of the Bush-Kerry contest still elicits chuckles, but it now looks stagier, tamer, and more removed from the issues of the day, which had not changed all that much in the ensuing two years. In the context of the sorts of video political content that circulated online in 2006, "This Land" plays like conventional television, designed to win ratings and put viewers in that relaxed state of mind conducive to the reception of commercial advertisements. (Put my interpretation to the test, and go see for yourself. As you do, you will be replicating a common practice among internet users.)

YouTube accommodates JibJab-style burlesques and much, much, more. Keyword searchers entering a political term will find wilder humor, lamer humor, timelier humor, and humor intended to persuade and mobilize as well as entertain. They may even find non-humor. Thousands of campaign-indexed videos poured into YouTube in 2006. The ones with strategic purposes behind them had a greater shot at influence thanks to political net users' embrace of the site's one-click innovations. But the YouTube community and culture had a reciprocal influence on campaigners. As candidates, activists, and pundits discovered that the gigantic repository had room for their audiovisual statements, their own genre—the often tendentious documenting of events on the campaign trail—loosened up in the company of YouTube's genres. Soon the official campaign videographer and the counterpart tracker from the opposing campaign found themselves mashing together candidate rhetoric, news reportage and commentary, and mischievous soundtracks and captions. The netroots found a way to make it work best for their side.

Ants at the Picnic

The basic stratagem behind the netroots use of YouTube updated a classic protest tactic. The goal was to irk the other side's campaign into an overreaction, capture it on video, load it onto the web, tell people about it, and throw the opposition off message. A call did not go out from a netroots leader to start tracking candidates with provocation aforethought. Instead, it just started happening in lots of campaigns. Perhaps this is an example of what internet enthusiasts call "emergent behavior," in which individuals attending to a few simple rules (go annoy, bring a digital camera, publicize the best results, repeat at the next event) generate a complex effect through their interactions.^x Scientists have documented emergent behavior among ants. Social science has yet to certify an analogous finding among humans. But when ants invade a picnic, Dad sometimes yells, yanks the blanket, and empties a can of Raid, to the displeasure of everyone else in attendance.

Whatever its provenance, the pattern was unmistakable. In Montana, Kevin O'Brien caught Senator Conrad Burns checking his watch and struggling to keep his eyes open at a farm bill hearing and posted "Conrad Burns's Naptime."^{x1} The video was set to "Happy Trails," the lullaby-like theme song of the old Roy Rogers television show. Representative Sue Kelly of New York was captured running away from the camera instead of answering a question. "RunSueRun" scored its embarrassing point in eighteen

seconds. Not every video worked to the netroots and Democrats' advantage. In New Mexico, silence and hesitation by challenger Patricia Madrid in response to a question about taxes from Republican incumbent Heather Wilson effectively squelched the Democrat's bid to unseat Wilson. The video title was "How Will Patricia Madrid Prevent a Tax Increase? Uhhhh..." The exchange occurred during a televised debate and received extra velocity from the right side of the blogosphere and talk radio.

The netroots treated a longshot primary challenge by Ned Lamont to Senator Joseph Lieberman of Connecticut as the equivalent of a special election. Local bloggers and activists caught the incumbent by surprise, and Lamont began closing the gap in polls. By late spring 2006, the primary had become a marquee race in mainstream media and national political circles. Moveon.org sponsored an online primary for its Connecticut members on May 25, with a 2/3rds vote requisite to win an endorsement; Lieberman declined to post a message to the virtual electorate of 50,000, and Lamont garnered 85% of the vote from the 10% who voted. The endorsement generated \$250,000 in one day, and hundreds of names of volunteers.^{xii}

The Lamont campaign had hired Tim Tagaris away from the DNC to coordinate its blogging and video compilations. Beau Anderson, a.k.a. "spazeboy.net," tracked Lieberman; along with Bob Adams, a.k.a. "ctbob," Anderson participated in a YouTube "news and blogs" group called "Nedheads." The inputs were edited by a man known as "Scarce" living in Nova Scotia.^{xiii} Keith Crane, a Democratic town committee member in Branford, ran DumpJoe.com and turned a photograph of President Bush bussing Lieberman into an attack symbol. Lamont's primary victory on August 8 was the first big electoral win for the netroots.

Three days later, the biggest online political video of the year was recorded at a real picnic in a park in rural Virginia. Senator George Allen stared at his tracker, whose name he knew, and referred to him as "macaca or whatever his name is." The young volunteer, S.R. Sidarth, phoned the James Webb campaign that night (a Friday) and played the audio portion of the tape to the campaign manager. Over the weekend, he e-mailed it to them and they glimpsed its potential significance. The Senator looked and sounded like he was taunting the young Webb volunteer, practicing the politics of ethnic exclusion. Since the object of his smiling derision was holding the camera, Allen in effect delivered his message straight at viewers as well, pointing his finger at all who were not part of "the real world of Virginia." The campaign leaked the video to a *Washington Post* reporter on Monday, August 14, and a story made page one the next day. It hit YouTube, and bloggers got hold of the incident. The Webb campaign also sent an email to its list: "Allen Demeans Webb Volunteer."

It is tempting to conclude that the online video turned the race upside down by itself. From there it is a short leap to dubbing 2006 the year of "The YouTube Election."^{xiv} A parallel techno-centric argument blames Congressman Mark Foley's political demise on Instant Messaging, a medium in which he communicated with House Pages about matters unrelated to the work of the chamber (and in which said messages were preserved).^{xv} It is certainly true that video has a power words alone do not, and that

the access structure of political video has utterly changed. But video moments do not make their way into public consciousness without the impetus of politically interested individuals, albeit now ordinary as well as wealthy and powerful people. By the summer of 2006, there were too many videos from both sides of too many election contests on YouTube for one of them to stand out on its own absent sensationally graphic elements (such as sex or violence). The “macaca” video was raised to prominence by the netroots and the Webb campaign.

Furthermore, a video (or set of text messages, or tape recordings) which threatens to scandalize a campaign will not do extensive damage unless the responses of the campaign protract its public life. The electorate generally gives the other side a chance to tell its side of the story --but a character under the interrogator’s spotlight needs to be forthcoming, truthful, and sensitive to those who have been genuinely harmed above and beyond the acceptable boundaries of hardball politics. In Foley’s case, the House Republican leadership extended and vitiated the scandal. In the macaca incident, George Allen provided his own noose.

Allen’s initial apology appeared in the same news cycle as the account of the incident. But so did an attack from his campaign manager, who said there was nothing to apologize for, and blamed the media and leftists for vilifying his candidate. Allen said the word “macaca” was a variant on “Mohawk.” This explanation touched off a collective inquiry in the blogosphere, complete with haircut photographs. The discussion echoed the online exchanges about type fonts which followed the notorious 2004 CBS News report on President Bush’s service in the Air National Guard.^{xvi} The Senator also said “macaca” was a “made-up word”; bloggers soon discovered its usage as a racial slur in Europe, and that Allen’s mother was European. On August 22, Allen apologized to Sidarth with a personal phone call –but not before a camera, so people could see his sincerity and the victim’s reaction for themselves.

The videotaped and subsequent behavior fit a previously documented pattern of Allen’s fondness for racially noisome symbols and actions. This included a noose displayed in his law office along with Confederate memorabilia, suggesting an endorsement of the practice of lynching. The incumbent’s reactions confirmed the suspicion, aired in political circles upon publication of a *New Republic* cover story months earlier, that the Senator had not outgrown the prejudices of his younger years.^{xvii} Other figures came forward to attest to Allen’s use of the word “nigger.” A story circulated about his having stuffed the head of a deer into the mailbox of an African-American family. And it did not help Allen’s case that he, not Sidarth, was the one not a native of Virginia.

Webb did not benefit directly from the disintegration of Allen’s reputation. The Democratic nominee had started fundraising in earnest after his March primary victory, with an email list of 2,000 names and \$40,000 in the bank. The netroots embraced him early and enthusiastically. Webb would wind up with 80,000 names, 35,000 contributors, and \$8 million, over half of which, \$4.25 million, was raised online. The biggest spike in his fundraising occurred after the challenger appeared in the company of the incumbent

on national television, a “Meet The Press” appearance in September. Webb held his own well enough to establish himself as a legitimate alternative to the tarnished Allen.^{xviii}

By late October, netroots figures were bearing down on the Albemarle County Court House in Charlottesville, Virginia, trying to obtain access to sealed court records of Allen’s divorce. One blogger approached the Senator after a speech in a hotel just two blocks away and asked him if he spit on his former wife; several men wearing Allen stickers on their coats grabbed him and wrestled him to the ground as the camera of a local television station whirred. “Allen Staffer Attacks Man” appeared online within hours.

Campaigns Within Campaigns

The internet lends itself to short-term or “flash” campaigns, political mobilizations which coalesce, perform, and disperse on an *ad hoc* basis. Protest and dissident movements have provided the best-known examples of political flash mobs; dispersal in those situations has been tantamount to eluding arrest. But conventional politics also accommodates these spurts of activity. Netroots campaigning in 2006 featured two types of campaigns within campaigns: those appearing as the result of individual imagination, and those stemming from careful planning.

Chris Bowers of MyDD ignited two flash campaigns within a single week in October. “Use It or Lose It” sought to shame Democratic Representatives with safe seats into transferring 30% of their campaign coffers to the Democratic Congressional Campaign Committee (DCCC), so that that party organ could disburse the money to candidates who needed last-lap infusions. This inspiration had several things going for it. It held out an olive branch to Rahm Emmanuel, chair of the DCCC, and other party insiders whose targeting approach had been scorned since the DNC fight at the start of the cycle. It flexed a muscle in the direction of House members, assuring them that the netroots would be around to check the results and hold them to it in years to come. And it reminded readers to part with more of *their* own money. “Use It or Lose It” helped to generate about \$3 million in transfers from the coffers of safe Democrats to the DCCC in that October week, according to FEC reports.^{xix}

Bowers’s other campaign launched “Google Bombing” runs against several dozen Republican incumbents. Google Bombing refers to the efforts of internet activists to raise the ranking of a particular site on a search return page through repeated accessing of that site. Such gaming of the search return formula was not new in politics (check out “miserable failure” and “waffle” sometime). This innovative flash campaign began with a public plea not just to engage in the practice on a wide scale, but to “nominate” antagonistic news articles as the site to be promoted. The results of this campaign were unclear. Although a good number of harsh news articles were lifted into greater prominence on the Google pages, no one knows how many web searchers noticed. After all, every search engine page displays nearly a dozen recommendations at a glance (including paid, or “sponsored” links), and most people are drawn to items which confirm their predilections and preferences (social science calls this “selective exposure”). To be

sure, had any of the Republican incumbents so targeted reacted angrily in public, the netroots initiative would have counted a victory, ants-in-the-picnic style. But none did, apparently.

As for carefully planned flash campaigns, Moveon.org has battened for years on this style of online politics. For 2006, emboldened and frustrated at once from a campaign cycle in which it had spent close to \$32 million in an effort to defeat President Bush's re-election, the group decided to close the gap with the GOP in what is known colloquially as "micro-targeting," but may be more completely termed data-driven politicking. Computers enable campaigns to expand their contact lists into rich databases by adding fields along the horizontal axis. Each new column contains additional information about the voters in the rows, including consumer purchase data (whence micro-targeting), response data to survey questions, and records of interactions with the campaigns. Then, when analytics are performed on campaign communications, more can be learned.

MoveOn.org massages its database of 3-4 million names regularly, and spends money on spot research as well. The research results informed its flash campaigning. In 2006, MoveOn.org ran a "Caught Red-Handed Campaign" in which \$1.5 million was spent in four congressional districts deemed peculiarly apt for them. Television time was purchased to depict the Republican incumbents as corrupt, colorizing footage of them so that their hands were literally red, a cinematic technique used in the film *Schindler's List*. Clinical-style message testing showed that the four targets went down 5-10 points in favorability polls, while in a comparable control group area where the ad did not air, no change in support was detected. The test results were shared with Moveon.org members as proof the ads worked --and two of the four targets would be defeated in November.

"Call for Change" was more elaborate. It deployed an internet-driven phone bank designed to get out the vote by directing calls from members all over the country into districts where live calls could make a difference. These weren't calls from friends, as the GOP's "72 Hour" get-out-the-vote program was famous for among political insiders. But they weren't robocalls, either. They were calls from strangers with online scripts and data sheets --and open data fields to fill, in order to make the next round of calls that much smarter. Call for Change targeted voters in 61 districts, with 98,509 people placing over 7 million calls in late October. Some calls emanated from house parties organized online, so that social pressure/conviviality could get people past any inhibitions. Participants were asked to commit to call one hour a week until the last four days before the election, when they were to call one hour a day, and two hours on Election Day.^{xx} This flash campaign contributed to Democratic victories across the country.

The Next Cycle

The netroots must now adjust to the change in party balance for which they share credit. Criticism and shaming was enough to unseat incumbents in 2006, just as negative messaging was for the GOP in 1994, when very few voters knew about "The Contract

With America.” It can continue into 2008, and indeed a list of 50 GOP members to target was posted on MYDD on December 20, 2006. But it is not enough to retain control of Congress, state legislatures and governorships, or win the presidency. The netroots recognizes that it should now support policy ideas along with the efforts of elected officials to enact them.

Furthermore, the freewheeling, “say anything” penchant of blogging and v-logging (v is for video) must be reconciled with the “you can’t say that” strictures of campaign lawyers and finance committees. Databases must be regularly pruned and updated, and messages must be regularly tested –requiring development of a set of information sharing protocols among candidate campaigns, the netroots, and party outposts and headquarters. Technical interoperability difficulties exacerbate this protocol challenge. And the sentences in this paragraph have been couched in the passive voice because it is an open question just who is going to do what. Republicans traditionally assign people to jobs within a hierarchical structure, while Democrats compete for turf more haphazardly. It is worth noting that John Kerry and Hillary Clinton command considerable online resources, and have tenuous relations with the netroots.

For their part, Republicans and conservatives must decide whether to hit the “refresh” button on *their* computers. They have perceived advantages on micro-targeting, data-driven politicking, and making use of social networks. Their message machine still functions impressively; both Drudge Report and TownHall.com dwarf DailyKos in traffic, although they do not have as robust an impact on grassroots activity. That may change now that the GOP no longer controls all three branches of the national government.

Meanwhile, YouTube has been absorbed into Google. The new corporate owners, as hip as they are, may slot and promote videos according to different criteria. Will the political impact be as large if YouTube videos can be seen only after either paying a fee or watching an ad (a.k.a. a “pre-roll”)? Regardless, every campaign will now monitor the site (and its competitors/successors as online video repositories) as part of its rapid response operation. Candidates would also do well to head to webcameron.uk and inspect the video blogging of David Cameron, the leader of the Conservative Party in Britain, for ideas on how to develop a videostyle to suit the medium. Among Democratic hopefuls for the 2008 presidential nomination, Tom Vilsack, John Edwards, and Barack Obama have already ventured into this type of communication.

General Lessons

Like other political forces, the netroots elbowed its way into power amid a frenzy of confusing rhetoric. The charges and counter-charges leave political scientists, historians, and their students with a fascinating research agenda. In the meantime, a few concluding thoughts.

Is the internet a left-leaning medium? One needs only to look back at the 1998 online release of the Starr Report and at the proficiency with which the Bush-Cheney

campaigns and RNC used the medium between 1999 and 2004 to discard this notion. An outsider medium? Yes, in that online campaigning may be conducted with low fixed costs, but not exclusively; again, look at Bush-Cheney, and at all the outsider campaigns that fail to make a mark. An unruly medium? If “unruly” connotes the rules of old media, then yes, so far.

The main structural generalization worth affirming at this stage of online campaigning is that the internet is a grassroots medium, which is to say a medium for activists to mediate between the occasional participation of citizens and the constant work of professionals. The netroots chose their name well. This mediating straddles and blurs a bundle of boundary lines observed through much of the 20th century, between journalistic narrating and political campaigning, fact and fiction, news and entertainment. These lines had already been breached by the political right and market-driven journalism by the time the netroots appeared. Technology ameliorates and arguably negates one of the chief rationales for the separations of conduct the lines enforced: that those few with the gatekeeping power should not take sides in political communication because there is no room for both sides, and it hurts democracy to have large audiences get a one-sided account. So long as the many behaving in an “unruly” fashion online adhere to other restraints –in other words, to protocols reflecting the values of accessibility, interactivity, transparency, and accountability-- then there is little to worry about the rise of online political movements. The criticisms of the netroots as unruly in this sense are largely moot or defensive.

There is a more hypocritical strand to the “unruly medium” argument: Some critics of the netroots, political bloggers, and the internet political community assail their anger. This is a valid observation, but a trivial and misleading contention. Angry voices get heard by those paying least attention, and their discomfort at nasty words and hostile tones receives a regular hyping from so-called media critics whose main purpose is defeating the ideas behind the voices. That’s fair game in politics. The intellectual and moral problem with this line of argument is that it too often fails to distinguish between righteous anger springing from genuine grievances and cynical anger designed to get attention and deflect blame. Vulgarity and personal hostility are often regrettable, but rarely reliable as signs of political extremism and anarchy. They are also not communication traits purely associable with the internet. It’s hard to believe that anyone can claim with a straight face that the blogosphere (and now YouTube) gives safe harbor to more political venom than talk-radio or cable television. But the claim airs all the time on all three media.

The historical generalization most supported by the story of the netroots in the 2006 cycle is that the best single adjective to place in front of the netroots as a movement is “antiwar.” There were other important issues and ambitions involved, but the idea that the war in Iraq was wrong unified and fueled the netroots. It lies behind the singling out of Lieberman and the post-“macaca” decline of Allen’s candidacy. Two-thirds of the Dean supporters in the Pew poll said the war was their top reason for joining the campaign. The war provided a ceaseless source of fresh news, and a supervening justification for anger. Dozens of Iraq war veterans ran for congressional office in 2006;

as VoteVets.org and BandofBrothers.org reflected the netroots in supporting several successful vet candidacies on the Democratic side, only one veteran of Iraq won a Republican nomination, Van Taylor of Texas, and he did not win a House seat.

The most dangerous and baseless generalization contends that the netroots have undermined American military operations. This is a familiar charge levied against antiwar movements. Yet netroots invective, prodigious and unjustified as it could be, was not aimed at the troops, as was antiwar verbiage during the Vietnam War. Nor was there valorization of the enemy; Jane Hamsher, who blogged at FireDogLake, was no Jane Fonda. The netroots acted squarely within a tradition of feisty political entrepreneurialism which goes back through the talk radio and direct mail initiatives of the right during the 1970s all the way back to pamphleteering in colonial times. Columnist George F. Will was right to twit the managing editor of *Time* magazine for claiming that “Thomas Paine was in effect the first blogger.”^{xxi} The netroots have not achieved change on the historic scale of Paine. But there is a connection, a continuity of means and ends between Paine and the netroots. Those Dean campaign respondents to the Pew poll who deemed themselves “patriots” have a legitimate and honorable stake on that word.

ⁱ For speculation on why mobile phones haven't broken through in campaign politics, see Michael Cornfield, “Mobile Campaigns Are Standing By,” *Campaigns & Elections*, October/November 2006.

ⁱⁱ AP-AOL News Poll conducted by Ipsos Public Affairs, Project 81-5861-09, October 2-4, 2006. A Pew Internet & American Life Project survey released in January 2007 reported that 14 million adult Americans used the net (including email) to post or forward content related to the elections. Six million signed up for campaign email, five million posted their own commentary to a newsgroup, web site, or blog, and three million gave money to a campaign through the net. “Election 2006 Online,” pewinternet.org, January 17, 2007.

ⁱⁱⁱ Lee Rainie, “Data Memo” December 2006, Pew Internet & American Life Project.

^{iv} Todd Ziegler, “Voter Contacts During 2006 Election Cycle,” *The Bivings Report*, December 22, 2006.

^v Pew Research Center for the People and the Press, “The Dean Activists: Their Profile and Prospects,” report released April 6, 2005.

^{vi} Jerome Armstrong and Markos Moulitsas, *Crashing The Gate: Netroots, Grassroots, and the Rise of People-Powered Politics* (White River Junction, VT: Chelsea Green Publishing, 2006), p. 133.

^{vii} Armstrong and Moulitsas, pp. 148-151; Ronald Brownstein, “MoveOn Steps Into DNC Chair Contest,” *Los Angeles Times*, January 26, 2005; Chris Nolan, “DNC Crossroads: To Dean or Not To Dean,” *Personal Democracy Forum*, January 25, 2005.

^{viii} YouTube.com fact sheet, accessed December 2006.

^{ix} Mark Glaser, “YouTube Explains the Mystery of Home Page Picks,” *MediaShift* December 13, 2006, www.pbs.org/mediashift.

^x Steven Johnson, *Emergence: The Connected Lives of Ants, Brains, Cities, and Software* (New York: Touchstone, 2002).

^{xi} Sam Home Verhovek, “Political ‘Tracker’ Is Looking for Err Time,” *Los Angeles Times*, October 12, 2006.

^{xii} INSERT, *Wall Street Journal*, August 1, 2006.

^{xiii} Jane Porter, “Shooting From the Clip: Nedheads’ Videos Mock Lieberman,” *Hartford Courant*, July 19, 2006.

^{xiv} Ryan Lizza, “The YouTube Election,” *The New York Times*, August 20, 2006.

^{xv} See, for example, the commentary by software executive Raul Fernandez, “Uploading American Politics,” *Washington Post*, December 9, 2006.

^{xvi} For an account of the CBS News scandal and the dynamics of the blogosphere, see Michael Cornfield, Jonathan Carson, Alison Kalis, and Emily Simon, “Buzz, Blogs, & Beyond: The Internet and the National Discourse in the Fall of 2004,” available at www.pewinternet.org .

^{xvii} The author of the piece was the same journalist who wrote (but may not have titled his piece) “The YouTube Election.” Ryan Lizza, “George Allen’s Race Problem,” *The New Republic*, May 8, 2006.

^{xviii} Presentation by and interview with Jessica Venden Berg, James Webb’s campaign manager, Center for American Progress Action Fund, Washington, D.C., December 1, 2006.

^{xix} Adam B(onin), *Daily Kos* , December 13, 2006.

^{xx} MoveOn.org, “Election 2006: People -Powered Politics,” remarks by MoveOn.org Washington Director Tom Mattzie at Center for American Progress Action Fund, Washington, D.C., December 1, 2006.

^{xxi} George F. Will, “Full Esteem Ahead,” *Washington Post*, December 21, 2006.