

INNOVATION Fund Application

Submission Date	2014-03-03 16:08:52
Organization Name	Chalkbeat
Tax-exempt status	Fiscally-sponsored project of 501(c)(3) organization
EIN of organization (or of fiscal sponsor's organization)	
Website address	chalkbeat.org ; ny.chalkbeat.org ; co.chalkbeat.org ; tn.chalkbeat.org ; in.chalkbeat.org
Phone Number	
Applicant's name	Elizabeth Green
Title:	CEO
Contact email	
Proposed Start Date	05-01-2014
Proposed End Date	04-30-2015
Total estimated project budget	\$28,280
Request amount:	\$28,280
In two or three sentences, describe your organization's purpose and audience.	<p>Chalkbeat's mission is to provide deep, local coverage of education policy and practice to inform the decisions and actions that lead to better outcomes for children and families. Our audience consists of people in four states — Colorado, Indiana, New York, and Tennessee — who participate in civic deliberation on public education in their communities. They may be professionals (teachers, administrators, etc.), education participants (students and parents), decision-makers and influencers (elected officials, policymakers, foundation officers, think-tank fellows) or members of the general public. In particular, we target people involved in key school districts serving low-income communities.</p> <p>Together, the bureaus reach an average of 125,000 unique visitors per month, and our visitors spend over two minutes on our sites on average. We reach a wider audience by working with formal and informal distribution partners in each bureau, including the NPR affiliates in all four markets, local daily newspapers, public television, prominent education blogs, and ethnic media.</p>
Describe in detail the project for which you are requesting funds. How does it fit with your sustainability plans? Explain the need for this project, and how you expect it to increase	<p>Our project is an experimental effort to add a new feature to MORI (Measures of Our Reporting's Influence), a WordPress plugin we developed over the last year and launched in February across the Chalkbeat network. MORI is a tool that helps Chalkbeat journalists plan their stories for maximum impact and then track what kind of influence</p>

revenue and/or audience engagement.

they have out in the real world.

The new feature we plan to add is a Constituent Relationship Management (CRM) tool integrated with MORI. This would allow us to link MORI's database of metadata on individual stories' target audiences, types, and topics to our efforts to distribute stories to particular readers or groups of readers directly and through our network of distribution partners in each bureau.* Distribution partners can be community groups and other media outlets. We are eager to learn whether building a CRM component on to MORI can help us increase our audience and its level of engagement with our stories by streamlining our systems for getting stories directly into the hands of people most likely to be interested in them.

If the CRM feature proves successful, it will enhance our ability to generate revenue (and thereby our sustainability) in two ways. First, it will boost our ability to attract paid sponsorships. Distributing our stories to people we know are interested in them will increase the size and engagement level of our audience, making us more attractive to national and local sponsors, be they advocacy groups, higher education institutions or businesses active in the education market. Growing and deepening our audience will also help our ability to retain and grow our philanthropic revenue, since demonstrating greater social impact is a key metric foundations and individuals use to determine support.

Here is a brief outline of our work plan for the CRM project.

1. Internal needs assessment to more precisely define our business needs (15 hours over three weeks).
2. Working with a consultant with experience designing CRM solutions, specify requirements for our CRM, and research and identify the best existing product to meet our needs (e.g., Salesforce or, more likely, a lighter-weight option like Insightly or PauPress) (25 hours, over six weeks)
3. Identify and procure a technical partner to develop and build a customized CRM for Chalkbeat (6 weeks)
4. Drawing on our internal capacity, migrate data on readers and distribution partners from existing databases to the new CRM tool (4 weeks)
5. Develop training materials and train the staff in the use of the new CRM tool (8 weeks)
6. Finally, working with the technical partner, execute Quality Assurance testing and make refinements as necessary (24 weeks)

*We debated internally whether to focus this first experimental project on reaching only distribution partners or also to add direct outreach to individual readers. Based on our early work understanding the technical requirements of this project, we think that it makes more sense to build both capabilities at once, but we plan to revisit this question as part of our first two phases of our workplan, outlined below.

Is this a new project?

Extension of an existing project. We are doing this now or have done it in the past year.

Who will help carry out the project? Describe the key staff and capabilities. If you plan to

Jon Sisk, Chalkbeat's director of technology, will be our internal technical lead on this project, helping us move through the requirements process in partnership with an

use outside partners, consultants, or vendors, tell us why you chose them (or how you will select them). Will you need to hire additional fulltime or part-time help to complete your proposed project?

outside consultant and helping us work through the procurement process. Jon is a Microsoft Certified Systems Engineer and Cisco Certified Network Associate, with 15 years in hardware support. He is also proficient in PHP, SQL and JavaScript development, although he does not have experience designing or building CRM solutions.

Anika Anand, Chalkbeat's director of engagement, will help lead this project by managing the needs assessment, helping migrate existing data to the new CRM, and training our staff in how to integrate their use of the CRM in their day-to-day operations. Anika's past experience includes lead project management on the development, implementation, and training for MORI.

To guide our internal needs assessment and conceive our requirements document, we will contract with a consulting partner with experience in designing, building, and rolling out a CRM. We believe the cost of working with an outside partner will be worthwhile given our experience building MORI with the help of an initial design consultant proficient in building information management systems. We have had an initial series of conversations with Katharine Anderson, Manager of Data and Analytics at the Center for Investigative Reporting, who led the design of that news organization's CRM, from requirements research to data migration and training, and is available to consult with Chalkbeat at a discounted rate.

Finally, we plan to work with an as-yet unidentified outside developer to customize our CRM solution and integrate the software with MORI. The cost of this work will depend on the CRM platform we decide to pursue. Initial estimates range from \$10,000 to \$25,000, with lightweight CRM platforms carrying lower development costs overall but a slight addition for WordPress integration depending on the platform and Salesforce carrying a relatively higher cost. Given our initial preference for lightweight platforms, we have budgeted \$15,000 for this expense.

How will you measure progress? Please be specific and concrete about the metrics you will use and how and when you will provide them to us for validation.

After several months of design, procurement, development, testing, training, and more testing, we launched MORI in February 2014. The tool enables us to track the effectiveness of our distribution strategies. Which of our distribution partners in each of our four bureaus are running or printing our stories? Retweeting them? Sending them out in newsletters? The information we collect between the launch of MORI and the implementation of the CRM will serve as baseline data. Then, with the CRM in place, presumably allowing us to be more efficient in our targeting of stories to particular individuals and distribution partners, we can measure whether we are able to increase the distribution of our content or generate better results through less staff time.

MORI provides us with the ability to collect these data on a detailed level. Chalkbeat will provide the INNnovation fund with a baseline report – distribution success pre-CRM – and quarterly reports once the CRM has launched. The MORI tool will be the means by which we generate these reports.

What do you hope to learn from this project, and how do you

We have already seen that MORI is having a positive effect on our newsroom —by helping reporters think more

hope to apply what you've learned over the long term?

strategically about their stories and who they hope they will reach, and also by providing data on our stories' impact to inform our future work. With this project, we want to see whether we can take this effect to the next level and make MORI a distribution tool, as well as a planning and measurement tool. The big question is, What tools can we build to enhance our ability to get Chalkbeat stories distributed in the most effective and engaging way, building our readership and better serving our readers? The specific question is, could one tool to accomplish this goal be a CRM integrated to MORI?

Why are you the right organization and team to do this project?

Chalkbeat is an established non-profit news organization with 125,000 unique monthly visitors to its education news websites. Its two founding sites in New York and Colorado each have six years of experience building, maintaining and engaging audiences. We've also proven our durability by surviving and thriving for six years, including through the Great Recession of 2008-09, increasing our earned revenue from zero in the early years of our existence to a projected \$393,000 in 2014. We've also grown from two separate organizations with a combined budget of under half a million dollars in 2008 to a single organization with a 2014 budget of just over \$3 million.

We've also gained valuable experience over the past year in developing and launching an innovative new product - MORI. We harbor no illusions about the challenges inherent in an ambitious undertaking like MORI, or this proposed CRM project. We've learned a lot about how to strike the right balance between remaining flexible and open to iterating and holding ourselves and our contractors accountable for deadlines and deliverables.

Why is this project timely? Why is now a good time to undertake this project?

Now is the ideal time for Chalkbeat to take on the building of a CRM. Last year was one of significant growth and expansion. We went from having two bureaus and 12 employees early in 2013 to four bureaus and a projected 23 employees in the second quarter of this year. At the same time, we have also been building our network infrastructure — the staff, systems, and tools we need to support our growth. Late in 2013, we hired an engagement director and we soon will be adding an engagement manager, who will be responsible for using analytics tools to help us distribute our stories more widely and strategically. We also plan to add a chief operations officer this spring, following a consulting relationship with an operations and systems specialist who has been working with us since January.

Now is also the right time for the nonprofit news industry to invest more in partnerships with both community groups and distribution partners. In our early years in New York and Colorado, we encountered skepticism from potential partners who struggled to see the value in sharing content. That has changed dramatically as both traditional media outlets' and community groups' understanding about how people consume content has changed. Today, we have more potential partners knocking on our door than we know how to manage. As the non-profit news sector evolves and the traditional media continues to face challenges, more people are realizing that it is important to work together and share content. Given our interest in offering MORI to other news organizations long term, an integrated CRM feature wouldn't

just help us — it could help other news organizations, as well.

Upload your project budget

[Chalkbeat INNovation-Fund-Project-Budget-Template.xlsx](#)