

TARGETING 101

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What is Targeting?

Targeting is the process of focusing resources. This means making decisions about which races are worth contesting, or making decisions about where to focus resources within a given race. These two types of targeting are both ways of allocating limited resources so as to get the biggest "bang for the buck."

When targeting voters within a single race, a campaign should focus its resources where there is the most chance of changing a voter's behavior-and hence the outcome of the race.

Why target?

The primary reason to target is that every campaign's resources are limited. You never have the time or money to do everything you would like to in a campaign. Targeting helps you to focus your limited resources where they will do the most good.

Another reason to target is message appropriateness. Even if you did have unlimited resources, not all messages are appropriate for all audiences. Targeting helps you to get the right message to the right people.

Who do you target?

There is no one answer to this question because deciding who to target depends on what the campaign is trying to accomplish. Different phases of a campaign will focus on different subgroups of voters.

Targeting focuses resources where there is the most chance of changing a voter's behavior. There are basically two types of behavior that a campaign can influence: whether someone votes, and for whom they vote. A campaign will focus on different subgroups with different messages to affect each of these behaviors.

- A campaign's **persuasion** program seeks to affect **for whom a person votes**.
- A campaign's **GOTV** (Get Out The Vote) program seeks to affect **whether a person votes**.

The ideal target subgroups for persuasion and GOTV can be defined by process of elimination.

For Persuasion, the goal is to talk to the people most likely to be persuaded by your message.

- Don't waste your resources talking to people who support your opponent
- Don't waste your resources persuading people who definitely support you (except to motivate them to volunteer)
- Don't waste your resources persuading people who are undecided and never vote

For GOTV, the goal is to turn out your supporters without turning out your opponent's supporters.

- Don't waste your resources turning out people who don't support you
- Don't waste your resources turning out swing voters
- Don't waste your resources on people who will never vote
- Don't waste your resources turning out people who are going to vote anyway

CREATE AN INTEGRATED FIELD STRATEGY FOR CONTACTING TARGETED VOTERS

There are a few key voter contact tactics that will vary in effectiveness according to the layout of your turf and how up to date the voter files are in your region. It is critical that you track key metrics on each tactic to determine which tactics work best for reaching your targeted voters and for moving them to support you and to vote.

Phone

Volunteer and paid calls to targeted voters can be used to ID voters (as supporters, undecided or for your opponent). High quality calls by well-trained callers can be used in combination with other tactics like canvassing and mail to persuade voters. You can also use phone calls to remind supporters to vote and to help them make a GOTV plan.

It is important to keep track of contact rates for calls (# of contacts with a live human/# of calls made) to decide how many times callers will have to pass through the whole universe to reach nearly everyone in the universe. Tracking contact rates will also help your staff find the best days and times to call different universes or different geographies.

Canvass

Door-to-door canvasses provide the highest quality voter contact, particularly when conducted by local volunteers working in their own neighborhoods. The number of contacts made per hour of staff or volunteer time is usually lower than on the phones, but the quality is much higher. Canvassing is most effective in dense urban and suburban areas and can be used for the same purposes as phone calls. Canvassers can also distribute persuasion or turnout literature as they canvass.

Mail

Mail is another form of targeted voter contact best used in combination with calls and canvassing. One advantage of mail is that it can reach rural and suburban voters who are difficult to reach face to face. Mail can be used to deliver a persuasion message to your persuasion targets, or to deliver a motivational message to help turn out your sporadic base.

Constituency Outreach

Constituency outreach is less targeted than phone, canvass or mail, but can be an effective way to engage voters who are concentrated in key demographic groups or key geographic areas. It can also be an effective way to register new voters in constituencies that highly support your candidate. Constituency outreach can be combined with your earned media work.

Constituency outreach may include outreach to elected officials, places of worship, schools, neighborhood organizations, advocacy organizations like environmental groups or women's organizations, barber shops and beauty salons in targeted neighborhoods, and so on.

Constituency outreach is most effective when combined with a well-organized supporter card drive (where supporters write down their current address and phone contact information) and a volunteer ask. It is critical that you track the number of positive IDs from your persuasion and sporadic base universes that are generated through constituency outreach just as you would with phone calls and canvassing to determine whether this tactic is worth your time and resources.

Creating a strategy for targeted voter contact will be an ongoing process that you, your Field Director and consultants work on together.

1. **Start with the ideal scenario.** How many times would you contact each voter in each universe to meet your ID goals, to persuade a sufficient number of voters, and to turn out enough of your sporadic base?
2. **Decide how you can best use the resources you have to get those contacts.** Where will your mail budget go the furthest? Where will your volunteer efforts go the furthest? Where can paid voter contact best fill the gaps?
3. **Evaluate your tactics every day in every region.** Look carefully at where the contact rates are best and why. Be sure your field staff and volunteers are trained to look at progress to goals, as well as tactical results so they can continually strategize too.
4. **Revise your plan.** If you're meeting goals, then where can you best invest your resources to get even more votes or to shore up the support you have? If you're not meeting goals, where do you need to use other resources, like modeling, to make up the difference between your goal and what your field program can produce?

On the following pages you'll find sample templates for your voter contact strategy. Be sure that you and your Field Director are keeping the budget information up to date in your campaign budget as your assumptions change in your voter contact strategy. Remember, every voter contact costs money in phone minutes, literature or mail.

This plan can be made more specific if your field team labels precincts as urban (canvassable), suburban (partly canvassable), or rural (not canvassable). This will allow you to create an even more tailored voter contact program by increasing the number of passes through your universe by canvass in your urban areas and increasing the number of passes by phone in your rural areas.

SAMPLE PLAN FOR "ENGAGING VOTERS" PHASE

UNIVERSE DESCRIPTION	STRATEGY & COST PER CONTACT	UNIVERSE SIZE	# OF PASSES	BUDGET (Cost per contact X Universe size X # of passes)
Sporadic Turnout Base	Phone (\$X/contact)	Y	Z	X*Y*Z
	Canvass (\$X/contact)	Y	Z	X*Y*Z
	Mail (\$X/contact)	Y	Z	X*Y*Z
High Turnout Persuasion	Phone (\$X/contact)	Y	Z	X*Y*Z
	Canvass (\$X/contact)	Y	Z	X*Y*Z
	Mail (\$X/contact)	Y	Z	X*Y*Z
Sporadic Turnout Persuasion	Phone (\$X/contact)	Y	Z	X*Y*Z
	Canvass (\$X/contact)	Y	Z	X*Y*Z
	Mail (\$X/contact)	Y	Z	X*Y*Z
New Base Voters	Voter Registration (\$X/form)	Y	Z	X*Y*Z
	Phone (\$X/contact)	Y	Z	X*Y*Z
	Canvass (\$X/contact)	Y	Z	X*Y*Z
	Mail (\$X/contact)	Y	Z	X*Y*Z
TOTAL				\$0.00

WINNING PHASE (GOTV)

Creating your strategy for the Winning Phase to Get Out The Vote is very similar to planning for the previous phase. You should create a table that looks like the one on the previous page and that can go into your campaign budget. The table below provides more detail about suggested GOTV field strategy for an intensely competitive race. (Most local campaigns will not have resources to make this many passes through all of the voter universe, so you'll have to choose selectively based on your theory of how to turn out the most votes for your candidate.)

SAMPLE PLAN FOR "WINNING" PHASE

	URBAN PRECINCTS	SUBURBAN PRECINCTS	RURAL PRECINCTS
HIGH TURNOUT BASE	None	None	None
SPORADIC TURNOUT BASE	1 mailing 2 canvass passes during early vote 2 phone passes during early vote 4 canvass passes during GOTV 3 phone passes during GOTV	1 mailing 1 canvass pass during early vote 2 phone passes during early vote 4 canvass passes during GOTV 3 phone passes during GOTV	1 mailing Mail Vote By Mail ballot requests 2 phone VBM ballot chase passes 2 phone passes during GOTV
HIGH TURNOUT PERSUASION (TO ID'D OR MODELED SUPPORTERS)	1 mailing 2 canvass passes during early vote 2 phone passes during early vote 2 canvass passes during GOTV 2 phone passes during GOTV	1 mailing 1 canvass pass during early vote 2 phone passes during early vote 2 canvass passes during GOTV 2 phone passes during GOTV	2 mailings Send Vote by Mail ballot requests to positive IDs 2 phone VBM ballot chase passes 2 phone passes during GOTV
SPORADIC TURNOUT PERSUASION	2 passes through universe by phone & canvass to ID & persuade 1 mail piece	2 passes through universe by phone & canvass to ID & persuade 1 mail piece	2 passes by phone & 1 mail piece
NEW BASE VOTERS	Same as Sporadic Base	Same as Sporadic base	Same as Sporadic Base

Once you have your voter contact strategy complete for the Winning phase, you can calculate how many volunteer shifts you need to complete your canvass and phone shifts and begin recruiting. It's never too early to start recruiting GOTV volunteer shifts!

At the end of this chapter you'll find other sample GOTV planning materials, including a sample Election Day timeline.

RUNNING A PAID PROGRAM

When writing your field budget, we highly recommend using your staff budget to hire good Organizers as early as possible so they can build the volunteer capacity you need to win. One Organizer with five teams of active volunteers leaders will reach more voters than one paid canvasser going door to door by herself.

That said, you will sometimes receive unexpected funding from your coordinated campaign or party committee late in the campaign to run a paid voter contact program. Paid phones can help supplement volunteer programs where your volunteer teams are weak, and quickly ID or turnout new supporters. Paid canvasses are more tricky.

Here are a few tips for creating a strong, integrated paid program:

- **Run everything inside your own campaign.** If you're going to have a paid canvass, then hire a Canvass Director onto your staff so that you can hold that person and the whole program directly accountable. Also hire the Canvassers directly so that they are directly responsible for all the work you're paying for.
- **Recruit carefully.** Don't just use the same paid people who always work Election Day. Recruit reliable high school or college students for door-to-door work, or pay your Organizers' best volunteer leaders to become Deputy Field Organizers.
- **Create an Intern or Deputy Field Organizer position.** Show those you're paying that you take their responsibilities seriously. Create a program with clear roles and responsibilities. Ask more of them. Make sure they spend their evenings and weekends at the doors, but also give them responsibility for working with their Organizer to manage volunteers, enter data, and recruit more volunteers through their own networks.
- **Give clear goals and hold them accountable.** Give your paid staff very clear goals just as you would with Organizers or volunteers. Not just tactical goals, but also supporter ID or voter turnout goals.
- **Train well.** Train your paid staff on core organizing skills. Don't assume that just because you're paying them you don't have to motivate them. Lack of motivation will certainly come through at the doors. Spend time training paid staff to tell their stories and to have quality conversations with voters. Then make sure they tally up after each shift and debrief together what worked and what didn't so they're getting better over time.