Campaign Training: Targeting and Voter Contact

OVERVIEW

- Calculating your vote goal
- GOTV methods
- Voter data and targeting
- Building capacity
- Building a timeline
- Next steps
TERMINOLOGY

✓ Vote Goal: The number of votes you need to win or advance to the runoff
✓ Universe: A specific set of voters you plan to contact
✓ Exclusion: Voters you specifically don’t want to include in your universe
✓ Scores: Data modeled to predict voter behavior
✓ Persuasion: Contact to likely voters focused on winning new supporters to your campaign
✓ Turnout / GOTV: Contact focused on turning out occasional or unlikely voters supporting (or inclined to support) your campaign

PROJECTING TURNOUT

✓ For each of the last three elections most similar to your own, look up the total registration in your district at that time and the number of votes cast in your race
✓ Look up past results at www.sdvote.com > Past Elections
SDCDP Campaign Training:
Targeting & Voter Contact

TARGETING: FIRST STEPS

Calculate Your Win Number

Registered voters
\times \text{Average of past turnout} = \text{Projected Turnout} \tag{\# of voters}

\text{Projected Turnout} \times 52\% = \text{Your “Win Number”}

DEFINING YOUR TARGETS

What information can we use to define targets?

- Party
- Gender
- Age
- Ethnicity
- Vote History
- VBM Status
- District/Geo
- Scores in VAN
- Early/Late VBM
- Voter IDs
- Household composition
FIELD METRICS

Setting ID and Contact Goals
- Vote Goal - Base = Vote Deficit

Key Metrics
- The call rate is how many phone calls an individual can make in an hour.
- The contact rate is how many conversations an individual averages in an hour, either by phone or at the door.
- The disconnect rate affects both the contact rate and the call rate.
- The knock rate is the number of houses an individual can visit in an hour.
- The flake rate is the percentage of people who don’t show up after committing to volunteer.
- The ID break is the percentage of each persuasion call that produces a 1, 2, 3, 4, or 5.

CONTACT RATES

A realistic baseline for contact rates:
- Phones: 10-20%
- Canvass: 25-35%

\[
\begin{align*}
9,000 & \quad 15\% & \quad 50,000 \\
\text{Contact Goal} & \quad \text{Contact Rate} & \quad \text{Attempts Goal}
\end{align*}
\]
## Field Math

**SDCDP Campaign Training:**
**Targeting & Voter Contact**

### Field Math Table

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### Campaign Assumptions:

#### 1) Phase 1

- PIV: Phone bank through 7/21
- 10 days with 8 phones
- 3 days with 15 phones
- (35 contacts/day) = 420 total contacts
- 1900 = D7
- 2800 = D7
- 50% support rate = D8
- 45% support rate = D12
- 900 Yees = D5
- 1250 Yees = D2

#### 2) Phase 2

- PIV: and non-PIV through 8/26
- 30 days with 10 walkers/phones
- (5 in D5) & (4 in D2)
- D5 = Door to Door = 15 walkers
- (25 contacts/day for 18 days) = 6750
- (13 contacts/day for 12 days) = 2340
- 5100 contacts Door to Door
- 69% support rate = 4550 Yees
- D2 = 4 Phones
- (30 contacts/day for 30 days) = 3600 contacts
- 45% support rate = 1620 Yees
**FIELD MATH CALENDERED**

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| **Priorities / Tracking**

- Priorities Needed
  - Limited Time
  - Targeting Tiers
  - Logistics
  - Limited Funds/Resources
- Precinct Density / Ranking
- Phone List Order
- Track and Adjust
## VOTER CONTACT METHODS

<table>
<thead>
<tr>
<th>Field / 2-Way</th>
<th>Volunteer phone calls</th>
<th>Door-to-door canvassing</th>
<th>Doorhangers</th>
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## PERSUASION VS. GOTV

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<tr>
<th>Persuasion / ID</th>
<th>Volunteer phones</th>
<th>Door-to-door</th>
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<th>Paid calls</th>
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<th>GOTV</th>
<th>Doorhangers</th>
<th>Door-to-door</th>
<th>Volunteer phones</th>
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</table>
INEFFECTIVE GOTV METHODS

Sign-waving  Email  Robocalls

STRENGTHS / WEAKNESSES

Door to Door
- Most effective form of voter contact
- Can be low cost/volunteer
- Time intensive + paid canvassing is expensive

Phones
- Can be targeted for specific programs unlike door to door
- Cheap/easy
- Not as effective as door to door
- Lots of voters w/ no # in file

Paid Voter Contact
- Never as effective as trained, local volunteer
- Can address key gaps in campaign bandwidth
- Costly
- More effective on ID than Persuasion; not very cost-effective for GOTV
### STRENGTHS / WEAKNESSES (cont’d)

#### Direct Mail
- Highly targeted, huge reach
- Can be compelling, credentialed
- Has a physical presence in voters homes
- Expensive, Negligible GOTV effect
- Typically the vast majority of a local campaign’s budget

#### Digital
- Combines targeting power of direct mail w/ emotional punch of TV
- Facebook and online cookie targeting
- Relatively cheap additional layer of communication
- Improving rapidly
- Video production is pricey

#### Yard Signs, Billboards, Print
- Most ineffective; to be avoided

### DATA SHOWS WHAT WORKS

10+ years of research measuring GOTV effectiveness
VOTER CONTACT BEST PRACTICES

Messaging
   Â Concise, Compelling, Targeted

Key Elements of Direct Voter Contact
   Â Make a connection
   Â Ask for Commitment
   Â Emphasize High Turnout

Repetition Is Key
   Â Layered Communication

VOTER CONTACT WORST PRACTICES

Ineffective Programs
   Â Sign-waving, robocalls, emails

Obsessing Over Undecideds

Poor GOTV Targeting
   Â GOTV is for occasional-voting supporters

Too Many Programs
   Â “Do One Thing Well”
### DATA-DRIVEN CAMPAIGNING

- Make strategic decisions about use of limited resources
- Tailor targets and messages for greatest effectiveness
- Set goals and accountability within the campaign
- Measure success and adjust strategy as needed

### DATA ENHANCEMENTS

- Commercial and user-added phone updates
- National Change of Address corrections
- Voter IDs (including from past elections)
- Daily early-voting data from the ROV
- Likely ethnicity
- Likely early / late mail voter
- Likely walkability
- DNC Scores in VoteBuilder
TARGETING YOUR VOTERS

- Time and money are always limited
- No need to spend many resources on base Dems who always vote, or any at all on non-voters or hard-core opponents
- The Democratic base is rarely enough to win an election, so we also need:
  - Frequent-voting persuadables
  - Occasional-voting Democrats
  - New registrants

TARGETING MATRIX

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<th>VOTE HISTORY</th>
<th>SUPPORT</th>
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<tr>
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<td>opponents</td>
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BUILDING CAPACITY

Å Organizational Capacity
   o Staff
   o Volunteers
   o Growth potential

Å Key Metrics
   o Canvass method - phones or canvassing
   o Contact rate assumptions
   o Shift length and estimated production

BUILDING A TIMELINE

Å Phases
   Å Transition from persuasion to GOTV
   Å Establish # of GOTV passes
   Å Calculate a timeline for each phase based on contact rate and capacity
   Å Factor in voting-by-mail
   Å Calculate ramp-up and growth in each phase, including key benchmarks
BASIC GOTV TIMELINE

Initial Persuasion / Voter ID  Vote-by-Mail GOTV  Election Day

Second ID Pass  Poll Voter GOTV

NEXT STEPS

- Acquire and analyze data for your race
- Create your ID / GOTV universe(s)
- Develop a plan and timeline
- Build voter-contact skills and capacity
- Logistics: Doorhangers / literature, phones, staging locations, script, volunteers and campaign leadership
- Work with the County Democratic Party