GRASSROOTS

TARGETING, VOTER CONTACT & MOBILIZATION: GETTING TO 50 +1

I. TARGETING

The first and most important step in creating your electoral plan is targeting your voters, or determining in detail which of those you will spend the vast majority of your time and resources to contact. Because touching every single voter in your district is impossible given limited time, human resources and money, targeting ensures that the voters you do spend precious resources to reach are the most likely to vote – and to vote for you – as a result of your persuasion efforts.
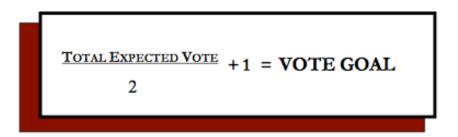
Your targeting goals are simple: to determine your overall *vote goal* – or how many votes you need to win – and to identify where you will go to find those votes within each specific precinct.

In order to determine your vote goal, begin by estimating the *total expected vote* for your race. This is accomplished by multiplying the *turnout percentage* from the last like election by the *number of currently registered voters* in your district.

One important note: turnout often changes dramatically between Presidential and non-Presidential election years. If you are running in a Presidential year, you should use the *turnout percentage* from the last Presidential year in which the seat you are seeking was on the ballot; the same theory holds true in nonpresidential years.

(Recent Turnout %) (Current Registration) = Total Expected Vote

Once you have determined the *total expected vote*, establishing your vote goal in a two-person race is easy: simply divide your total expected vote by two and add one.

$$\frac{\text{TOTAL EXPECTED VOTE}}{2} + 1 = \text{VOTE GOAL}$$

Let's assume you live in a district with 50,000 residents. Of those, 30,000 are registered to vote, and 60% of those registered voters participated in the last like election. Using the formula outlined above, the *total expected vote* in your race will be 18,000. Assuming you are competing in a two-person race, your vote goal is 50% of that figure plus one vote – or 9,001 votes. In order to allow for margin of error, you should plan to aspire to a vote goal of 9,100, or approximately 51%.

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But where will those votes be found?

The targeting process begins with the basic assumption that your voters fall into three categories: the "base" voters most likely to support you and to vote on Election Day; the "swing" voters you will persuade with your message; and your opponent's base voters, whom you should waste no time or resources to contact. The primary tool used to determine which voters fall into each category is the *voter file,* or the record of registered voters in your district, their party affiliation, and their voting history. Your state party will be able to tell you how and where the voter file can be obtained, and you should get it as early in the campaign as possible.

By using the voter file and assessing key data such as the party affiliation of each voter and his/her history of voting in general elections and primaries, we can make educated assumptions about which voters fall into each of these three categories, and from there begin our targeting. (Many state parties on both sides of the aisle have appended their voter files with enhancements to each record, such as issue preferences, specific demographic information and organizational memberships, that can help target voters in an even more individualized and granular fashion. While this is not necessary for traditional targeting, it will become more commonplace and more necessary in the years to come).

The next step is to evaluate the data on your district provided by the National Committee for an Effective Congress (NCEC). NCEC provides detailed and reliable analysis of past election results that reveal the turnout percentage, expected vote, percentage of persuadable voters, number of persuadable voters, Democratic performance, and average Democratic vote *for each individual precinct* in your district. Used effectively, this information will strongly inform your voter contact program and ensure that you are spending the most time in those precincts with the highest percentage of persuadable voters.

Using NCEC data, which can usually be readily obtained from your state party or caucus, we begin by calculating the *Democratic vote per precinct*, which will tell us how many votes a Democratic candidate *in each precinct* will receive on average. This figure is calculated by multiplying the *expected vote* in each precinct by the precinct's *Democratic performance* – or the average percentage of votes that a Democratic candidate can be expected to receive in that precinct.

(Expected vote) (Democratic performance) = Democratic vote

By calculating this figure for every precinct in the district and adding them together, we can determine the number of votes district-wide that you can reasonably expect to receive from loyal Democratic supporters who vote consistently and therefore can be expected to so again. If this number is less than your vote goal, the difference tells you

the number of votes you will need to make up in order to win.

TARGETING MATRIX

	ALWAYS VOTE DEMOCRATIC	PERSUADABLE /SWING VOTERS	ALWAYS VOTE REPUBLICAN
ALWAYS VOTE		PERSUASION #1	
SOMETIMES VOTE	GOTV	PERSUASION #2	B
NEVER VOTE	A	A	A/B

Your next step is to determine your plan for how and where you will find 1338 additional votes. There are two primary ways to do this – by increasing *Democratic performance*, or by increasing *voter turnout*. The matrix above illustrates which clusters of voters you will reach out to in order to accomplish these goals.

In order to increase *Democratic performance*, you will need to persuade Republicans and Independents to vote for you with the use of targeted voter contact and earned and paid media. As a rule, if your goal is to increase performance, you should reach out to persuadable voters in high Democratic performing precincts specifically.

In order to increase *voter turnout*, you will need to spur infrequently voting Democrats to show up on Election Day. This is generally an easier task than persuading even frequent-voting Republicans to vote for you, so it is a wise investment of time and resources. If increasing turnout is your goal, you should identify and prioritize precincts with a high *Democratic performance* and a low *turnout percentage*, spend time

registering new voters there, and put a heavy emphasis on GOTV activity on the infrequent voting Democrats in those areas.

The importance of targeting simply cannot be overstated. As you can see in the example outlined above, targeting allows you to take a 50,000 person district and break it down into a manageable and affordable universe of potential votes. To campaign any other way is to waste precious resources and leave your victory to chance.

II. VOTER CONTACT

Once you've determined how many votes you need to win and where you will find them, you will need a comprehensive plan for direct voter contact in order to reach those particular voters. You will make direct contact with your voters in three primary ways: door-to door visits by you and your volunteers and/or paid canvassers; persuasion mail; and phone calls from volunteers or a paid phone bank.

As a rule, the most effective voter contact is always that which allows the candidate to reach voters in the most personal and interactive way possible.

Without question, doing exactly that should be the driving force behind your voter contact program and your campaign plan and budget as a whole.

- **Door Knocking.** We begin with door knocking, because it is the most personal way to reach your voters. It is also the most time-consuming. Most state and local candidates need to spend at least 2-3 hours per day knocking on doors over the course of the campaign, and often more. The targeting information you have compiled should determine which precincts you prioritize with your door-to-door visits. You should begin your walking schedule in areas where you need to increase *Democratic performance*, and spend the final weeks in those areas in which you need to increase turnout.

    While you should plan to visit as many doors as possible in person, canvassing is also a task tailor-made for campaign volunteers. Knockers should be armed with a "walk packet" prepared by the campaign staff that includes a highlighted map of the neighborhood, a list of the specific homes on each street that need to be visited that is gleaned from the voter file, campaign literature to provide to every home, and a general instruction sheet should questions arise.

    Volunteers should be fully trained and provided with talking points on your message before being sent out.

    Any time you or a volunteer makes contact with a voter, a notation should be made on the walk list and returned to the field director indicating whether or not

that person intends to vote, and if so, who they plan to vote for. These "campaign IDs" will then be used to enhance the voter file, hone the general targeting matrix, and ultimately save the campaign time and money when it comes time for GOTV.

Your goal should be to make a personal visit to the door of every targeted voter in your district – or using the targeting matrix above, every voter that falls into the categories noted specifically for persuasion. Assuming as outlined above that you need to knock on 1338 doors, you have five months to do so, and you're going to walk 5 days a week, or a total of 120 days, you will need to knock on 66 doors per day in order to stay on schedule. As a general rule, you can hit 30 doors per hour, so you will need to budget approximately 2.5 hours per day, six days a week for those five months in order to reach your goal.

1338 households = 66 households per day, 6 days per week for 5 months

- **Direct Mail.** Equally as important as door knocking is reaching your voters with direct mail, the production and postage for which will make up a significant portion of your campaign budget. Again, you should aim to reach your targeted voters as often and with as targeted a message as possible. Within your targeted voter universe, it is recommended that your campaign conduct additional analysis on the voters themselves using available voter file enhancements to determine which message will be most effective with each group of voters.

  For example, you may plan to send every sometimes-voting and always-voting swing voter six pieces of mail over the course of the campaign. While every voter would receive a bio piece as well as contrast piece featuring the record of you and your opponent, you may choose to send single women in those categories a specific piece touting your work on the environment, married voters a piece touting your work on education, and union households a piece on jobs and the economy. Everyone should receive a GOTV piece and an absentee ballot, including your GOTV universe of always-voting Democrats. Ultimately, you should aim to reach your targeted universe at least six times with persuasion mail in the months leading up to Election Day.

- **Phones.** The third way to make direct contact with your voters is with a well-organized phoning campaign designed to persuade voters to support you. These calls are made by volunteers and focus on the same universe of voters dominating your walk schedule and your direct mail effort. Made during the final two months of the campaign, calls require an organized operation utilizing a large number of trained volunteers and phones and well-developed scripts. Your campaign should assess the total number of phones and volunteers you will need over the final two months in order to reach your targeted universe.

Just like with door-to-door visits, phoners should be provided with a detailed script, and data gleaned from voter responses should be added back to the voter file to hone the GOTV universe.

> *Mail and phones and media are important, but nothing can substitute for personal contact with voters. You have to go to their doors and ask for their vote!*
> *- Congresswoman Gwendolynne Moore (WI)*

III. GOTV

Unless you can translate your support into votes you will not win, no matter how much money your raise, how compelling your message, how slick your direct mail or how large your army of volunteers. Get-out-the-vote (GOTV) efforts are the activities specifically designed to make sure your supporters vote on Election Day. Your campaign will need to move into active GOTV mode the final week of the campaign, and your plan should include all of the following:

- **Absentee ballots.** You will want to mail absentee ballots, or information on how to obtain them (depending on the process in your state) to your entire GOTV universe, which includes sometimes-voting Democrats as well as voters from your targeted universe that you have successfully persuaded to vote for you. On this front timing is everything; it is critical that your supporters receive your mailing 5-10 days before they are required to return it in order to give them ample time to do so.

- **GOTV calls.** Your campaign should place volunteer and/or auto-generated calls to your entire GOTV universe in the week (phones are going all the way through this period, but I always start the GOTV script to yes's the Friday before election day – right?) leading up to Election Day to remind them to vote and ask if they need a ride to the polls. If you are using volunteers, you will want to do the math and secure a phone bank and volunteer pool large enough to reach your entire targeted universe in the week prior to Election Day.

  Another option is an auto call, which is a pre-recorded phone call using your voice or that of someone with high favorability in your district, such as a well regarded local celebrity or elected official, to deliver a message encouraging those in your GOTV universe to vote on Election Day.

  GOTV calls are also critical on Election Day and are used as a means to contact your targeted voters who have not yet voted by late morning; you should have a phone bank and team of volunteers in place throughout Election Day to make

these live calls.

- **Poll watchers.** You will want to assign one volunteer poll watcher to eachvprecinct who is responsible for pulling lists of those who have voted at several pre-determined times throughout the day, ideally at 10:00 am, 2:00 pm and again two hours before the polls close. Poll watchers then take these lists to campaign headquarters where they are compared with your campaign's list of GOTV targets; any of your targets who have not voted receive are then flagged for additional and immediate contact before the polls close to remind and encourage them to vote.

- **Flushers.** Once your poll watchers have pulled lists and the GOTV targets who have not yet voted have been identified, flushers are then sent out to knock on the doors of those voters. Your campaign should assign several flushers to each precinct, arm them with walk maps, make sure they can accurately direct voters to their polling location and provide them with a ride to the polls or information on how to get one should they require it.

- **Rides to the polls.** Your staff should have several drivers on call to provide rides to those who may need them, such as the elderly, persons with disabilities, and those without transportation. Providing ample information on and access to rides to the polls at senior centers and assisted living residences and in low income neighborhoods in your district is a good way to help ensure participation of voters in these communities.

- **Visibility.** While it is the lowest priority on Election Day, visibility – or campaign supporters holding your signs – standing on busy street corners and across the street from polling locations is a good way to use volunteers if your phoning, flushing and poll watching needs are covered. The most effective time to implement visibility is at busy intersections during rush hour and at the polls during peak voting hours, including before and after standard office hours and during lunchtime. Make sure your campaign is familiar with the laws governing visibility at polling locations, as many states regulate these activities.

Following is a typical Election Day schedule of GOTV activities:

- 6:30 am Poll Watchers Arrive at Polls
- Drive Time Visibility Begins
- 7:00 am Polls Open
- Poll Watchers Begin Tracking
- Poll Workers Hand Out Literature
- Candidate Votes
- 9:00 am GOTV calls begin

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- 10:00 am Poll Watchers Pull First Voter List
- Flushers and Callers Begin Making Contact
- 12:00 pm Volunteers Deliver Food to Poll Watchers
- Flushers are Provided Lunch at Headquarters
- 2:00 pm Poll Watchers Pull Second Voter List
- 6:00 pm Poll Watchers Pull Third Voter List
- Poll Watchers Join Poll Workers or Flushers
- 7:30 pm GOTV Calls Conclude
- 7:45 pm Poll Watchers Return to Inside of Polls
- 8:00 pm Polls Close
- Poll Watchers Get Final Results

By combining a strategic targeting effort with concentrated and interactive voter contact and a fully realized plan to turn out your vote, you will be well on your way to victory on Election Day.