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CAMPAIGN RESEARCH



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Why is Research Important on a Campaign?

The technical and legal aspects of placing an issue on the ballot represent areas that must be researched and understood as your group or organization is deciding whether or not to seek voter support for a levy or bond issue. But that is not the only kind of information that must be discovered and developed as you evaluate your chances of success or plan your campaign. Just as important is learning about the nature of your district, its leaders, its voter inclinations, issues of importance, available donors, volunteers, vendors, and media. If you do regular public engagement you are well on your way to having much of this information developed. You will merely need to collect it and organize it into the campaign plan.

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Research work begins early and in some ways continues through the entire campaign. In this document we explore some of the information development needs campaigns have and describe ways for finding out what you need to know as you go forward.

Legal Context/Campaign Finance Law

Understanding the laws that govern electoral campaigns is critical. This is the area that can cause the most trouble, not only for a campaign but for the organization itself and the individuals who are part of it. We recommend that you have early conversations with the Board of Elections (BOE), the county auditor, and other entities in your area who have had ballot questions before the public in recent elections.

It is important to note that in Ohio, as elsewhere, ignorance of the law is not a defense. In fact, a candidate or committee can be penalized for mistakes made even when they are acting according to the specific advice of the BOE. If the BOE staff member is wrong, you are wrong. Make sure you get information from several different sources, including a local attorney. By planning ahead, you may be able to recruit one to donate their time for the benefit of the organization.

Opinion Leaders/Media

Who are the major players in your community? How do they get their information? What do they care about? Of course, these are all questions you should be asking long before you are in the midst of a campaign effort. Determining who influences whom, and how, is a key part of your ongoing public engagement efforts.

If you are just setting out to develop this information as you plan for a campaign, consider doing a round of light interviews with local government, business, education, and civic leaders. Perhaps ask them the basic SWOT (Strengths-Weaknesses-Opportunities-Threats) questions and get a feel for what they think about your agency and its services. Another important source of information will be those people who have led other recent levy efforts in your area – schools, libraries, senior programs, mental health or MRDD boards, health departments, etc. They will have a very good sense about how information – positive and negative – flows around your community.

Just as important, be sure to study your media outlets. Develop your list of contacts for each paper or broadcaster who reaches in to your district. Ask their marketing departments what their circulation is, or what demographics they target or reach. Ask other campaigns if they have a file of clips from previous elections. Get online and enter key words into the newspapers' search engine and get a feel for what kinds of stories they are likely to do. Find out which reporters will be covering your effort and how they like to receive information: phone, fax, or email.

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Understanding Your District

One of the very first things to do is develop a profile of your district. Using U.S. Census Bureau data and information from the county auditor, find out about the demographics and economics of your district. What is the average home value in the various precincts? How does your district compare to others with respect to age, race, gender, income, education, party affiliation, and occupation of the residents? What types of people most regularly use your organization's services and where do they live? Are people of one party or the other more likely than others to support or oppose you?

It is also important to understand the specific electoral context of your election. What other issues will be on the ballot with you? What candidates? How will their presence affect your race? What level of voter turnout is expected? Do you expect organized opposition? Go ahead and ask your local elected officials for their opinions on these questions.

Targeting

During your campaign planning phase, you'll be conducting a targeting analysis employing information from your Board of Elections and mathematical calculations. This usually involves creating a big spreadsheet full of data. The information for targeting comes from two primary sources – the voter database and past election returns. Secondary sources include polling and focus group research.

Voter Database

Once you have identified a volunteer who is familiar with database programs and is willing to spend some tedious hours sorting and coding data, ask the Board of Elections to provide a disk with the voter file data in a format compatible with what your volunteer wants or needs. (Microsoft Excel is a common format, easily obtainable from the BOE and easily uploaded into other database programs, such as Microsoft Access.) When you request the disk, make sure the BOE provides you with the following fields for each voter:

- Full Name (all fields, including suffixes like "Jr.")
- Mailing Address (all fields, including secondary addresses such as P.O. Box numbers.)
- Precinct Name (if precinct data is given in codes, make sure you get a paper copy of the code list.)
- Voter ID Number (a unique number given to each voter and handy for some database operations.)
- Date of Birth (so you can calculate age.)
- Party Affiliation (so you can determine likelihood of voting in a primary election.)
- Voter History (this is a series of fields, one per election, indicating whether or not that person voted. You'll want every election for the past two years, plus the last two "like" elections.)
- Voter Registration Date (so you can tell if someone's failure to vote in previous elections is because they are a new voter.)
- School District Code (if your district covers more than one school district.)

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Such computer files can also be obtained from the Ohio Secretary of State's website, but it should be noted that statewide data is updated only twice a year, whereas county BOE data is updated continuously. Also, you may want to make sure you purchase a new list after voter registration ends 30 days before the election. Finally, most county Boards of Election do not keep phone numbers in their databases, so unless you have a large number of volunteers willing to look up phone numbers, you'll need to explore using a vendor to append phone numbers to your database for a fee.

Past Election Information

These are paper printouts of precinct-by-precinct results for previous elections. You'll want copies of returns from issues your agency itself has had on the ballot in the last ten years, plus any other levies that have been on the ballot in your district recently, especially those from "like" elections. Some Boards of Election maintain this information on their website for easy access.

Election Math/The Targeting Analysis Spreadsheet

With the data in hand, you are ready to create your spreadsheet. Start with a list of the precincts in your district and, using the voter database, enter the number of registered voters in each. Next, calculate the Projected Voter Turnout for each precinct. To do this, enter precinct-by-precinct election returns for several past levy efforts – your own, and some others from "like" elections (see "Like" Elections below.) Using the voter turnout percentages of previous like elections, estimate the voter turnout percentage for each precinct in your district. These will often vary widely within a district, or even within a village or township. If you are uncertain whether turnout is likely to be higher or lower than previous like elections based on what you are observing around you, ask your Board of Elections or other elected officials for their opinions about your political environment.

To calculate your MAGIC NUMBER, determine the total number of votes you must have in order to win each precinct. This is 50% plus 1 of the Projected Total Vote.

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- Average Turnout Percent of registered voters in like elections: _____
- Projected Turnout Percent = Average Turnout Percent as adjusted up or down a point or two based on your observation of your political environment: _____
- (Projected Turnout Percent) X (Number of Registered Voters) = _____ = Projected Turnout.
- (Projected Turnout) / (2) = _____ + 1 = MAGIC NUMBER.

"Like" Elections

When doing targeting, it is vitally important to compare apples to apples – "like" elections to "like" elections. If you are planning to be on the ballot in November of a gubernatorial election year, you are most interested in turnout figures and "yes" vote percentages of other gubernatorial elections. If you are planning to be on the ballot in May of an odd-numbered year, you are most interested in the results of other May elections in odd-numbered years. When looking at past election data, especially voter behavior, make sure you are comparing similar elections.

Message

A key mistake often made by ballot issue campaigns is to assume that those serving on the committee can determine on their own which messages will work and which won't. But it is important to remember that those who work on campaign efforts are usually not swing voters. We are not persuadable voters. We don't make up our minds late in the process. We are not disinterested citizens. We read a paper every day, vote in every election, and we know where we stand on most issues. The very fact of being involved makes it a challenge for a group of campaign organizers to get into the hearts and minds of those we seek to influence.

What is your most powerful selling point to those swing or undecided voters? This is what you must find out. When an organization is actively involved in regular public engagement activities that drill down below the level of community leadership, it probably has a sense of the various strains of thought among the public. What you must research is the persuasiveness of the case you want to make. Use your instincts to determine which messages to test through polling and focus groups.

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Polling

Though expensive, there is no substitute for the data that can be generated through polling. A good poll uses a scientifically-randomized sample of the group you are testing, and in that way is very different from and more valuable than the kind of mailed paper surveys that rely on recipients to “opt in” to the respondent pool. A good poll can reveal not only how the organization is perceived by the public, but also what the likelihood of success is for different millage levels. It will determine who and where your supporters (and opponents) are, as well as who and where your persuadable voters are. It can provide very useful information about what arguments swing voters find persuasive, including those issues anti-tax activists might raise. A good pollster will provide a report that summarizes and analyzes opportunities for targeting and assigns priorities for the campaign, even recommending specific language choices.

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There are many options for getting good survey research. Your organization or Friends group can commission a poll, as long as they don't test specific “vote for Issue X” themes. Some communities have joint surveys where different groups and organizations each purchase a few questions and are billed only for their portion of the survey. Make sure they are testing likely voters for the specific election you are interested in (primary vs. general, presidential vs. off year) as opposed to just the public in general.

In addition to message testing, pollsters can also help develop the data needed for targeting purposes:

- ❖ Who are the voters most and least likely to support you?
- ❖ Who can be persuaded? What issues concern them? What positions will affect their voting behavior?
- ❖ Where do they live?
- ❖ When will they decide?
- ❖ Where do they get their information?
- ❖ What do they value about your organization?

These are the questions you must answer as you plan your campaign effort.

Focus Groups

Focus groups are great tools. A focus group is generally a two-hour facilitated discussion of some eight to ten people drawn from your pool of undecided voters as identified by your pollster or by volunteers working from voter lists. It should be a rather homogenous group (women-only, for example) in order to encourage the greatest degree of sharing. It should be held in a neutral location and conducted by a neutral third party facilitator, not by someone associated with your organization. Notes or transcriptions are then furnished by the facilitator to the committee. Test your own draft messages as well as the opponents' projected line of attack – will what they say about themselves hurt us? Will we need to respond to it when they say what they say?

Focus groups can be conducted early on, as you are deciding whether or not to go forward, and they can be conducted before you implement voter contact programs, in order to be certain that your chosen messages are effective with your targeted voters. Focus groups should not be confused with community forums or town hall meetings. These are specific means of developing specific information.

Additional Research Needs

The final set of research needs for your campaign is much more mundane than the rest, but important nonetheless. Taking care to have the information available before you get into the heat of voter contact can save a great deal of wear and tear on campaign leaders and volunteers. Fundraising, volunteer recruitment, voter contact, and visibility efforts all require information to run effectively. So here are some other things to look into:

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- ❖ Who gives money in your community? The Board of Elections maintains files of the contribution lists from all other campaigns, issue and candidate, so go ahead and pull those early on to get a sense for how much people in your community may be willing and able to give. Many non-profits also publish their donor lists, so keep a file of those newsletters and newsclips throughout the year.
- ❖ How does bulk mail work? You need a separate permit, and someone on the team who knows how to meet all the postal requirements. What experiences have other campaigns had with mail arriving on time? When will it need to be delivered to the post office in order to arrive by a certain date? Do you have printers in your area who operate a mail house as well? Or will you need volunteers for those efforts?
- ❖ What assets and resources do you have available? Do you have ready access to phone lines or office space or even clipboards for door-to-door canvassing? What restaurants in town are likely to donate a pot of coffee or tray of donuts for a campaign event? Do any of the spouses of your board members have a talent for graphic design? For organizing people? For running a computerized database of voters? Do any of your staff have a talent for making public presentations? Put together a spreadsheet of the skills you have on the team and those you need to recruit.

Conclusion

Preparation is the key to success. Research, like planning, is one of those campaign tasks that can be done early. When done well, it can not only enhance your chances for success, it can also make those final weeks of the campaign more bearable for leaders and volunteers. Most organizations should be blessed to have people around who enjoy engaging in these kinds of activities. By putting them to work early, you will not only be making your job easier, you will also be putting your campaign on the path to a happier election night.