Campaign and Research Strategies

Ben Patinkin
Grove Insight
Session agenda

✓ Introductions & session goal
✓ Survey research: when & how
✓ Use results to write ballot titles
✓ Know your voters
✓ Organize your campaign
✓ Questions???
Provide participants with an understanding the importance of survey research and its applications to successful finance campaigns.
Some reminders

- Cookie-cutter campaigns don’t work
- Wins today are based on data
- Your own district data is the only data that matters for your win
Successful campaigns

Successful campaigns have:

- Ballot measures that reflect community priorities identified by research
- Research that shows a fighting chance of winning (60% when simple majority required)
Successful campaigns

✓ Strong citizen leadership
✓ Stick to their written, research-based campaign plans, carrying them out 100%
✓ Advocacy efforts coordinated with district information for maximum impact
Successful campaigns

✓ Identify “yes” voters
✓ Deliver the right personalized messages to the right voters
✓ Get “yes” voters to vote!
A good survey tells you:

- What to place on the ballot
- How to win

Winner!
Campaign and Research Strategies

Designing, Implementing and Acting on Effective Opinion Research
Research agenda

- An Overview of Opinion Research
- Research Timing
- Overview of the Research Process
- Interpreting the Results
- Turning Research into Action
An Overview of Opinion Research

- Why Research?
- Methodology
- Approach
Determining need for research

- Determine viability of a proposal
- Shape language in the ballot question
- Determine what components can or should be included in bond or levy
- Provide a message frame
- Identify outreach targets, base of support and opposition
Phone surveys for ballot measure generally are conducted by one of two methods:

- **Voter file purchased from a vendor, such as Labels and Lists.**

- **RDD, or random digit dial sample, also purchased from a vendor. At this point in time, these surveys should always be supplemented by interviews among a cell phone only sample of voters.**
Phone survey methodology

✓ Voter file purchased from a vendor, such as Labels and Lists:

- Typically has the most information regarding political geography such as precinct data, city codes, or legislative districts.

- Also includes vote history which allows the campaign to pick and choose who can and cannot participate in the survey. This is especially useful in an off-year or primary election.
### 1: All Registered Voters

<table>
<thead>
<tr>
<th>Voter-Count</th>
<th>Gender-Count</th>
<th>%</th>
<th>Age</th>
<th>All</th>
<th>%</th>
<th>Men</th>
<th>%</th>
<th>Wmn</th>
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### 2: New Registrants (Since 11/1/2008)

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<td>66</td>
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### 3: Voters who Voted at least once (1 of 4)

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<td>2,330</td>
<td>44.7</td>
<td>2,875</td>
<td>55.2</td>
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</tbody>
</table>
RDD, or random digit dial sample, which is also purchased from a vendor:

- Less specific data attached, but provides every person in the district or county with a LANDLINE an opportunity to participate in the survey.

- In order to make this more inclusive than a voterfile, you need to supplement with an RDD sample of cell phone lines. Calling cell phones is cost prohibitive—but may be necessary.
Survey size is usually determined by budget and size of jurisdiction.

For local surveys, sample sizes of 300, 400 and 500 are the norm.

Sample size can also be determined by a need to “oversample” a specific portion of the population.
Determining survey size

✓ Example of need to “oversample” a specific portion of the population:
  – If polling is being considered in Multnomah County and a campaign wants a good look at the portion of the county outside the City of Portland, it may want a larger number of interviews, an “oversample,” than normally would be conducted in this portion of the county.
Margin of Error

✓ Margin of error is a term used to determine how likely voters’ opinions are to match a particular result.

Example:
- A survey of n=300 voters provides a margin of error +/-5.6%.
- This means that voters opinions are generally plus or minus 5.6% of the result gleaned in the survey.
Margin of Error

✓ Margin of error is higher in demographic crosstabulations:
  - When looking at crosstabulated data, such as men or women, the margin of error is much higher.
  - For smaller surveys (like n=300 sample sizes), this means it is much harder to look underneath the overall result and determine trends among specific subgroups like women or Independents.
When looking at margin of error, researchers typically refer to “confidence level.” This indicates how confident they are their data accurately matches public opinion.

- Example: a 95% confidence level indicates that if a survey were conducted 100 times, in 95 of those cases the survey results would be within the margin of error.
Survey length

✓ Survey length determined by the campaign budget and type of survey that needs to be conducted.
  – Keep in mind: the number of questions included in a survey has little bearing on cost.
  – It’s the length of the questions as well as the number of interviews needed that determine the cost.
Survey length

✓ Baseline surveys are typically the longest and most expensive survey.
- Baseline surveys are performed at the beginning of a campaign.
- They help determine the message frame, outreach targets and overall viability of a proposal.
A campaign should also perform tracking surveys.

- Tracking surveys are much smaller than baseline surveys.
- They're used to measure how well a campaign’s messaging is working and determine course corrections in message or outreach strategies.
Research Timing

- When to Survey
- “Shelf Life” of Results
When to survey

✓ Timing is determined by a number of parameters:
  - When ballot titles are determined
  - When property tax statements are mailed (DO NOT POLL AT THIS TIME)
  - When voter pamphlet statements are due
  - When ballots are mailed
  - The election date
Survey before ballot titles are adopted

- Surveys conducted before a ballot title is adopted can:
  - Be paid for with local government funds
  - Help determine viability of a concept
  - **Clarify what bond or levy should or should not include**
  - **Help determine most advantageous wording for ballot title**
  - Provide basic message guidance and outreach targets before fielding the actual campaign poll
  - Assess when it is best to place the measure on the ballot – Primary or General Election
Survey before voter pamphlet statements are due

✅ This type of survey is typically the baseline survey conducted for the advocacy campaign. It can:
- Help determine what bond or levy components package are most compelling to voters
- Provide the message framework
- Identify compelling messengers
- Define the target audience and base of support, as well as the opposition
Polling before/after voter pamphlet statements are mailed

These should be smaller “tracking” surveys designed to ascertain whether advocacy campaign should:
- Make minor course corrections in the message frame or
- Target different voter types
When does data get “stale?”

Many things can happen during the course of a campaign.

✓ If a survey is conducted a year or more out from an election, generally speaking, it can be assumed the data has grown stale with age.

✓ Events may take place that make data irrelevant only weeks or days after it exited the field.
When does data get “stale?”

✓ One baseline survey conducted a few months before an election can generally be used up to election day.

✓ Unless unforeseen events dictate otherwise, the message frame and outreach audience should change very little between the time baseline survey is conducted and the election.
Overview of the Research Process

- Design & Collaboration
- Implementation
- Timeline
Overview of survey development

✓ Gather relevant information for your research team:
  – Reason(s) for your measure – what issues or challenges do you face?
  – Draft ballot language and concepts
  – Measure components
  – Costs, studies and reviews provided by third parties
  – Funding priorities

✓ Meet with your research team to review project objectives
Your research firm will draft a survey and work through revisions with your team until a final survey is agreed upon

- The process is collaborative and allows for small teams or committees to provide input
- Appointing one person from your group to make final decisions on survey wording and content is helpful to the process
Overview of survey content

Typical questions:
✓ School district/county/city rating
✓ Awareness of key issues/problems measure seeks to resolve
✓ Ballot testing
✓ Measure component testing
✓ Information/message testing
✓ Information sources
✓ Demographics
Overview of interview process

The research firm will:
✓ Acquire the telephone sample for survey
✓ Pre-test the survey for coding and clarity
✓ Conduct interviewer briefing
✓ Conduct a random sample among the target population, following all industry standard procedures and ethics
✓ Ensure the completed interviews are representative by region, gender and age
The research firm will:

- Code open end responses into like categories
- Provide a topline of results (the survey with percentages listed for each response)
- Provide a phone briefing on topline results
- Provide a written report, including charts, cross tabulation tables and an executive summary
- Provide a presentation of findings and recommendations
## General Research Timeline*

<table>
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<tr>
<th>Initial Meeting</th>
<th>Draft Survey</th>
<th>Revise/Finalize Survey</th>
<th>Field survey</th>
<th>Topline Results</th>
<th>Discuss Topline Results</th>
<th>Final Report</th>
<th>Presentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2 hours</td>
<td>1-3 hours</td>
<td>1+ days</td>
<td>2-3 days</td>
<td>1-2 days after fielding</td>
<td>Anytime after topline</td>
<td>10 days after fielding</td>
<td>Anytime after report is done</td>
</tr>
</tbody>
</table>

*timeline can be expanded or contracted as needed
Interpreting the Results

- What will you learn from the analysis?
- How can you use this information?
The executive summary and charts will detail:
- Overall findings for each question
- Statistically significant findings by subgroups: gender, age, region within district, parents/non-parents, etc.
- How the district/area is perceived
- How well electorate understands challenges and needs
- Voting intentions
- What measure components are effective, which aren’t
- What details might be useful in an information campaign and how do they impact voting intentions
- What information sources voters rely on
The report also provides suggestions for:

- Targeting information for components and messages
- What components to include in the measure
- What language is effective in the ballot title and summary (if tested)
- What level of funding earns support (if multiple levels are tested)
- What information sources may be effective in an information campaign (if tested)
Turning Research into Action

Sherwood School District
Clackamas County
Turning research into action: Portland Community College

✓ Conducted surveys in August and September 2008
  - Measured awareness of issues facing the college
  - Tested proposed components of the measure
  - Tested different funding options
  - Tested information/messages about the measure
Turning research into action:
Portland Community College

✓ Results of Survey Used to:
  - Determine what components were most popular
  - Determine what information would help voters understand the issues and proposed measure
  - Target subgroups with specific information
Results:

✓ Passed $374 million bond measure—largest school funding measure in Oregon history (November 2008)
Turning research into action: Salem-Keizer School District

✓ Conducted survey in March, 2008
  – Measured support for bond
  – Tested measure components and possible price points
  – Tested voter priorities for spending
  – Tested message concerning over crowding and growth
Turning research into action: Salem-Keizer School District

✓ Survey results used to:
  - Determine how to phrase ballot title and what to include in it (omitted less popular components)
  - Determined potential price point
  - Determine what information would help voters understand issue and proposed measure
  - Determine what information or concerns drove opposition to the measure
  - Identified target subgroups
Turning research into action: Salem-Keizer School District

✓ Results:
  – Passed $242.1 million dollar operations levy with 58% of vote (November 2008)
  – Began with support under 50%. Demonstrates importance of defining message and distributing through a highly effective and motivated campaign
Questions

- Research process questions?
- Questions on examples?
- Other?
Campaign and Research Strategies

Designing, Implementing and Acting on Effective Opinion Research
A good survey tells you:

How to write the ballot title:

- **Caption** — 10 words
- **Question** — 20 words plus required words
- **Summary** — 175 words plus required words
- **Explanation** — 500 words, if county prints a voters’ pamphlet
PORTLAND COMMUNITY COLLEGE BOND
TO UPDATE EXPAND LOCAL
EDUCATIONAL FACILITIES

QUESTION: Shall PCC expand, modernize, construct facilities for additional students, programs; upgrade technology; issue $374 million in general obligation bonds; audit spending? If the bonds are approved they will be payable from taxes on property or property ownership that are not subject to the limits of sections 11 and 11b, Article XI of the Oregon Constitution.

PASSED
SALEM-KEIZER SCHOOLS BOND TO RENOVATE, UPGRADE AND CONSTRUCT SCHOOLS

QUESTION: Shall District renovate, update, increase safety in existing schools; construct schools; issue general obligation bonds of $242.1 million, with oversight? If the bonds are approved they will be payable from taxes on property or property ownership that are not subject to the limits of sections 11 and 11b, Article XI of the Oregon Constitution.

PASSED
ESTABLISH A COUNTYWIDE LIBRARY SERVICE DISTRICT IN CLACKAMAS COUNTY

QUESTION: Shall District be formed for countywide libraries to restore hours and retain services; $0.3974 per $1,000 assessed value beginning FY2009?

PASSED
CENTENNIAL SCHOOL BOND TO RENOVATE, UPGRADE, REPLACE AND CONSTRUCT SCHOOLS

QUESTION: Shall District renovate existing schools, increase safety, construct new schools; issue general obligation bonds of $83.8 million with citizen oversight? This measure may cause property taxes to increase more than three percent.

DID NOT PASS
Know your voters

✓ Who votes?
✓ How often?
Who votes?

Find out who’s registered by:

- Gender
- Age
- Parents/length of residence
- Frequency of voting
- Number of households
- Phone numbers available
- Absentee (out of state)
### All Registered Voters

<table>
<thead>
<tr>
<th>Voter-Count</th>
<th>Gender-Count</th>
<th>%</th>
<th>Age</th>
<th>All</th>
<th>M</th>
<th>Wmn</th>
<th>Times-Voted</th>
<th>%</th>
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<td>408</td>
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### New Registrants (since 11/01/2005)

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### Voted at least once (1 of 4)

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<th>Age</th>
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<td>20.1</td>
<td>2,140</td>
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<tr>
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<td></td>
<td>60+</td>
<td>1,997</td>
<td>849</td>
<td>1,148</td>
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<td>19.3</td>
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### Voted at least twice (2 of 4)

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<th>%</th>
<th>Age</th>
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<th>M</th>
<th>Wmn</th>
<th>Times-Voted</th>
<th>%</th>
<th>Cum-Tot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1: 3,497</td>
<td>1,538</td>
<td>44.0</td>
<td>18-24</td>
<td>29</td>
<td>9</td>
<td>20</td>
<td>0/4: 1,912</td>
<td>35.3</td>
<td>5,409</td>
</tr>
<tr>
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<td>56.0</td>
<td>25-34</td>
<td>259</td>
<td>114</td>
<td>145</td>
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<td>35-44</td>
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<td>215</td>
<td>232</td>
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<td>45-59</td>
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<td>469</td>
<td>581</td>
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<td>952</td>
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### Voted at least three times (3 of 4)

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<th>M</th>
<th>Wmn</th>
<th>Times-Voted</th>
<th>%</th>
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<td>9</td>
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<td>927</td>
<td>741</td>
<td>1,205</td>
<td>**: 2,132</td>
<td>100.0</td>
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</tbody>
</table>
Determining the makeup of your electorate:

1. What type of election is it? General, primary, odd year, special?

2. What else is on the ballot?

3. What will drop-off from statewide elections to the local be like?

4. What can you do to increase turnout among less likely voters who are likely to be supporters?
Parents as voters

Are parents and other younger voters registered?

How do you know?

How will you make sure this happens?

Who can you enlist (PTA?) to help?
How many votes do you need to win?

✓ Your # registered voters ______
✓ X expected % turnout ______
✓ = # who will probably vote ______
✓ 50% + 1 needed to win = ______
✓ + 35% to assure a win = ______
✓ = Total needed to win ______
Before you begin...

Questions that need a “Yes” answer:

1. Do we have a fighting chance, as measured by public opinion research?
2. Do we have internal unity among elected officials, administration, staff, and key constituents?
3. Do we have a “failsafe” plan?
4. Are we able to design and execute an outstanding election campaign?
Remember

The board’s job is to make a unanimous decision and support the campaign.
Remember

The district’s job is to provide the facts.
Remember

The campaign’s job is to identify “yes” voters and make sure they vote.
Steps to Winning

- Research
- Identify “yes” Voters
- Target messages
- Get messages to voters
  - three contacts
  - at least one of them personal
- Get “yes” voters to vote
On money measures:

No voters are more apt to vote than “yes” voters.
Too many “yes” voters are “infrequent voters”:

1 out of 4 elections
2 out of 4 elections
Successful Strategies for Finance Elections

Dollars and volunteers drive what you can do!
Use Research to...

Choose activities that have the **BIGGEST** impact on the most voters!

Vote Yes!!
Questions

- ✔ Research process?
- ✔ Writing ballot titles?
- ✔ Identifying voters?
- ✔ Campaign organization?
- ✔ Other?