



Report to the Australian Political Exchange Council

INDIVIDUAL STUDY TOUR OF THE UNITED STATES

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EXECUTIVE SUMMARY

I would like to thank the Australian Political Exchange Council for the opportunity to undertake a study trip to the United States in March and April 2013. I would particularly like to thank Suzy Domitrovic and Hilda Selim from the Australian Political Exchange Council for their great assistance in organising the study tour.

The objective of my tour was to investigate the significant shift in campaign strategy and tactics undertaken by the Democratic Party and the broader progressive movement during the 2008 and 2012 US election cycles. Of particular interest were the increasingly pivotal role of digital campaigning and the Neighbourhood Team field organising model developed by the 2008 and 2012 Obama for America campaigns.

I also took the opportunity to explore the approach to open government and digital communication in some of the largest cities in the US.

During the course of the study tour I visited Boston, New York, Washington DC and Chicago where I was fortunate enough to meet with a wide ranging of political and campaign professionals. These included former staffers from the Obama for America campaigns, many of whom have continued in similar roles with Organizing for Action, unions, non-profits and a number of staff in different divisions of the Democratic Party. A full list of meeting contacts is contained at the end of this report.

While acknowledging the key role still played by traditional campaign areas such as communications, my trip and consequently the accompanying report focus primarily on the newer additions to the campaign model in data, analytics, digital and the overhauled field organising model.

The Democratic Party's focus on issues-based, personalised contact with voters is a significant departure from traditional political campaign techniques employed in Australia and elsewhere and offers enormous potential for re-engaging an apathetic electorate. The challenge for Australians in seeking to learn from campaign practices in a system like the United States is to find the elements which can be scaled or adjusted to suit our vastly different electoral system and resource capacity.

I would like to thank the Australian Labor Party for nominating me for this study tour. It was a great privilege and I sincerely appreciate the assistance of all those who played a part in facilitating the opportunity. I would also like to extend my gratitude to the many people I met with who were so generous in sharing their time, insights and experience.

Lissie Ratcliff
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CATALYST FOR CHANGE: 'We got sick of losing'

"What brought the progressive community together was defeat."

-- Former Senior Aide to President Obama

The achievements of the Obama for America campaign in 2012 are now well known and much of the reporting and analysis focuses on the scale and structure of the campaign organisation which delivered the victory.

The team assembled to re-elect the President was the biggest in US history. The campaign opened over 800 field offices, recruited 2.2 million volunteers, trained 10,000 Neighbourhood Team Leaders (NTLs) and over 30,000 Core Team Members (CMTs), and collected donations from 4.4 million people.

But what was it that spurred this dramatic turnaround in the party's electoral success and the radical shift in the campaigning approach?

After a narrow and controversial win in the 2000 Presidential Election, the Republican Party, led by Karl Rove, decided they had no intention of risking such a close result in the following cycle. In 2004, the Bush campaign and the RNC identified the voting base they needed to turn out and dedicated the huge resources of the campaign to getting those people to the polls. It was a resounding success and George Bush convincingly won re-election.

Having suffered two devastating defeats in eight years, the Democratic Party and the broader progressive movement decided things had to change.

Questioned about the catalyst for such a dramatic overhaul of the approach to campaigning, the answer from people across the Democratic Party and allied organisations is consistently: "we got sick of losing".

Recognising they would never be able to match the Republicans for big dollar donations, the Left realised they would have to get smarter about finding the voters most likely to be supportive, persuade them to support President Obama and then get them to a polling booth. To do this would require a grassroots fundraising and organising effort on a scale never before attempted in American politics.

The wholesale restructure of the Democratic campaign strategy focused heavily on the introduction of new roles and disciplines that had previously played, at best, peripheral roles in previous elections. Data, technology, analytics, digital and the professionalisation of the neighbourhood organising model created a new campaign model.

Rigorous testing of NTLs and CTMs brought a new level of professionalism, investment and accountability to the huge volunteer force. Leadership positions, even volunteer ones, had to be earned rather than assigned. Driving the entire campaign from Chicago down to the neighbourhood teams in Ohio was a dedication to excellent attention to detail, rigorous testing and a strong focus on meticulous forward planning.

"There's no detail that isn't worth staying back an extra 10 minutes to get right."

-- Deputy Digital Director, Obama for America 2012

While the exciting ‘new kids on the block’ of digital, data, technology and analytics have received the lion’s share of the credit and attention stemming from the Obama campaign’s success in two election cycles, it should not be forgotten that while the 2012 analytics department may have boasted a record 50 staff, the communications team still consisted of some 80 people. The role of the traditional teams of fundraising, political, operations and finance teams were not less important under this new campaign model but rather each expanded to accommodate the additional campaign platforms. As one person who had been intimately involved in both the campaign and government incarnations of the Obama machine put it, with digital:

"You're adding platforms, not subtracting them."

-- Former Senior Aide to President Obama

The new focus on digital, data, analytics and technology does not take resources away from the traditional focus of a campaign but rather enhances them, and in many cases, serves to make those traditional campaigning methods more efficient.

DATA: ‘You’ve got to build the List’

"If it's not entered into VAN, it didn't happen"

-- Technical Director, Democratic National Committee

Much has been made of the Obama campaign’s harnessing of ‘big data’ to direct its activities. The campaign amassed a database of more than 16 million email addresses and collected countless points of information on voters all over the country. Every single interaction was logged in VoteBuilder, the Democratic Party’s official voter file software.

As part of my trip I met with NGP VAN, the private provider of VoteBuilder and a range of other voter contact tools. VoteBuilder is an extraordinarily impressive piece of software architecture which has been painstakingly developed over the last several election cycles. It allows campaigns to identify voters, create lists and store voter information gathered through surveys and other interactions. As impressive as the system is though, the Democratic Party’s true advantage lies in the meticulous, almost obsessive approach to recording every interaction with, and available data point on, a voter.

"Volunteers are invested in having quality data, because it's their work too."

-- Technical Director, Democratic National Committee

There is nothing new about doorknocking or phone calling as methods of voter contact. Traditional political campaigns would see these interactions logged on reams of paper before being painstakingly data entered into a spreadsheet or simple database which might be used as a basic stocktake of who had been reached. But the doorknockers of 2012 went about their mission armed with iPads and mobile apps which allowed instant entry of a wide range of data points and live records of all interactions with each voter.

ANALYTICS & TARGETING: 'X is greater than Y'

"Less magic, more science."

-- Technology Director, Democratic National Committee

The challenge facing political campaigns everywhere is the diminishing return from traditional forms of voter contact. People check their letterbox less often, have switched from landlines to mobile phones, and watch delay their television viewing by days or weeks. The three forms of voter contact which have dominated political campaigns for a century are now failing to connect with huge sections of the electorate. To combat this, political parties are now forced to find new ways to connect with their target audiences.

It has become increasingly obvious that these older forms of communication are not achieving the same cut through they once did. The question of 'how much does it cost to shift a vote' can be answered comprehensively for any number of contact methods in the American context but the Australian political industry has not yet undertaken the same extensive research into the effectiveness of various contact methods.

Where the Republican campaign viewed thought about digital, technology and analytics as a single entity, within the Obama campaign and the broader Democratic infrastructure each had a distinct role to play.

In 2012, the Obama campaign dedicated a staff of 50 people to ensuring it practiced "empirically sound resource allocation". The Analytics team tested everything from direct mail to email to phone call scripts. Some emails went through 18 iterations before the most effective version of the message was finally distributed.

Where direct mail had previously consumed an enormous share of any campaign budget, the Obama campaign's direct mail budget was about one fifth of what was spent on its field organisation. And rather than focusing the TV ad buy in the traditional prime time slots, the analytics team identified hundreds of niche audiences who could be effectively targeted by a deliberately scattered and far more cost effective media buy.

Modelling

"Slice and dice the universe you're talking to."

-- National Issues Director, Organizing for Action

Rather than relying solely on the standard tracking polls, the Obama campaign developed a dynamic model to monitor minute shifts in electoral sentiment. Combining a phenomenal amount of information on voters including large scale voting intention surveys, commercial data and all of the interactions gathered by the field team, the analytics team developed statistical models which generated a support score between 0 and 100 for each voter. These scores were fed back into the get-out-the-vote (GOTV) and persuasion campaigns. The scale and frequency of the surveys allowed the campaign to track small shifts in the race which would otherwise have been missed by traditional tracking polls.

DIGITAL: 'You have to meet people where they are'

"If you're not online then you're leaving too many people out of the conversation."

-- Former Senior Aide to President Obama

Email

The driving force of digital campaigns is email and as such, it commanded the largest team within the Digital department. All other digital activities are aimed at collecting email addresses and building 'The List'. In an electorate where engagement with printed material through the letterbox is decreasing and reaching people by telephone is increasingly difficult, email is a fast, frequent and cost effective method of communicating with the electorate. The Obama campaign built an email list of almost 20 million members which has since been retained by Organising for Action and is now used to prosecute the President's second term agenda on gun control, immigration reform and climate change.

The largest group within the digital department was the team dedicated to writing emails. The hundreds of emails which were sent out by the campaign were each rigorously tested with multiple subject lines and copy variations. Email drove a significant proportion of campaign's online donations and the wrong email sent out could potentially lose millions of dollars.

Social

As a former senior digital operative put it, "the internet is not a stage from which to shout." In order to be effective, social media communication must be a two-way conversation. Too many politicians and political campaigns continue to use platforms such as Twitter and Facebook as a broadcast medium rather than an opportunity to engage with people in their own space.

"You have to cede a huge amount of control."

-- Former Senior Aide to President Obama

Where in previous decades, political campaigns have sought to control every aspect of their message, open online engagement requires campaigns to relinquish some measure of control in exchange for the organic flow of debate.

The content created for the campaign's central social media channels set new standards for digital political communication and broke records for reach and engagement. The photo tweeted on Election Day of the President and Michelle Obama embracing was the most retweeted image in Twitter's history.

Web Design

Both the 2008 and 2012 Obama for America campaigns set new benchmarks for design and branding in political campaigns. Once developed, the campaign's brand was ruthlessly enforced at every level. The web properties, primarily barackobama.com, went through multiple iterations of A/B testing and user optimisation.

The website played a crucial role in volunteer recruitment and in fundraising. The portals for each of these were adjusted multiple times to improve conversion rates. Once a volunteer entered their contact information into the website it was immediately logged in VoteBuilder and then swiftly followed up by the field team.

FIELD & TRAINING: ‘What’s your story?’

“Everyone has a story. Everyone has multiple stories.”

-- National GOTV Director, Obama for America

While in Washington I met with a range of people who had been heavily involved in the field and training operations of the Obama for America campaign and also with the SEIU and National Education Association (NEA) which had both made significant third party contributions to the so-called ‘ground game’ in 2012.

The field organisation assembled by the Obama campaign in 2012 was different not only for its size but also for its extraordinary emphasis on training, structure and the empowerment of volunteers. Every battleground state had a Field Director and Training Director and a significant investment was made to get people on the ground to establish a presence early in the election cycle.

Investing in this early presence allowed the campaign to begin building relationships and networks in communities and provided greater opportunity to recruit volunteers to the local campaign effort.

The campaign’s field and training programs operated with the motto ‘*Respect. Empower. Include.*’ Each person involved in the campaign from those making high level strategic decisions at campaign headquarters in Chicago to the university student or retiree volunteering a few hours of their time each week understood exactly what they were contributing to the larger effort.

“Leadership has to provide validation.”

-- National GOTV Director, Obama for America

Time with the candidate or with surrogates was offered as a reward and incentive for volunteers. Twice a month the President would call a Field Organiser whose team had performed well and have a 15 minute conversation. These informal chats provided enormous incentive not only to the Field Organisers who received the call but also flowed on to the neighbourhood teams working under them. This and other forms of acknowledgement and validation delivered volunteers who were willing to work even harder.

Training in all aspects of the campaign from digital to data management to door knocking was comprehensive, allowing knowledge transfer throughout teams and building new relationships. As soon as a neighbourhood team grew large enough it was divided into two and the team recruiting and building process began again.

Recruiting volunteers

The process of recruiting volunteers was ongoing. Anyone who showed up at a campaign event for Obama – from a rally of 10,000 to a house meeting of just 20 would be asked to add their details to a sign in sheet. Even if people indicated they weren't interested in volunteering, their contact details were recorded and added to a list of potential volunteers.

The campaign placed an unusually strong focus on opening field offices, ending up with more than 800 across the country. Having a visible presence in a community significantly increased volunteerism and provided the local staff and volunteers with greater ownership of their corner of the campaign operation.

The Neighbourhood Team Leader model used by the Obama campaign has been now successfully applied in Mexico, France and Canada. As a senior Obama field staffer put it, "good organising works everywhere".

Speaking to those who had played a key role in developing, refining and implementing the NTL model provided an extraordinary insight into the cultural shift and commitment required to recruit and maintain such a vast network of volunteers.

Training the next generation

In addition to a number of Obama staff who had been involved in the training operations of the campaign, I also met with the New Organising Institute (NOI) which provides training to Democratic and progressive activists with a focus on digital campaigning. Basing its approach on adult learning principles and best practice in digital campaigning, the NOI has effectively turned out a generation of progressive activists across the country. In addition to the extensive suite of tools, tips and guides available on the NOI website, the organisation also runs regular 'boot camps' where intensive training takes place over the course of about a week.

OPEN GOVERNMENT: 'Provide the data and they'll build it'

I took the opportunity to meet with the digital teams in New York City and the City of Chicago to investigate the approach to open government and digital engagement in two of America's biggest cities. While the two cities are taking different approaches to the development of digital engagement and open data, both have seen these areas come into their own during natural disasters. Social media and open data have assisted local governments in the US to inform, rescue and warn their citizens during major disasters like Hurricane Sandy and less serious weather events such as snow storms.

New York City

NYC Digital was established in 2011 with the mission of making New York City the world's leading digital city. As part of Mayor Bloomberg's Office of Media and Entertainment, NYC Digital has developed a *Roadmap for a Digital City* which focuses activity in five core areas: access to technology, education, open government, engagement, and industry.

In addition to streamlining digital communication from all City agencies, NYC has established partnerships with large and small local companies to deliver free Wi-Fi in public spaces and provide internet access to thousands of low income residents through initiatives such as Mobile Broadband Kiosks. Australian governments at all levels should follow this lead in exploring the options provided by partnering with local industry to provide Wi-Fi access to public spaces, including public transport. The potential productivity and economic benefits are huge.

NYC has recently passed ground-breaking legislation which will see all of the City's data sets opened by 2018. This approach to open data has created numerous opportunities for the public to assist in solving civic challenges and creating digital solutions for the City to adopt or refine.

City of Chicago

The City of Chicago under Mayor Rahm Emanuel has appointed its first ever Chief Technology Officer and now includes a social media team as part of its media and communications structure.

The City has taken the unusual decision of electing not to build its own apps for services such as public transport but has instead provided free access to data sets and allowed the best offerings from private developers to self-select through popular take up.

The City's digital team is trialling crowdsourcing online support and donations for community campaigns, developing public-private partnerships to deliver internet access and using social media to identify potential issues such as proactively reaching out to Twitter users who have tweeted about having food poisoning.

CONCLUSIONS

The philosophy driving much of the campaign strategy and activity of the Obama for America campaign and progressive politics more broadly will not necessarily be new to Australian campaign professionals. The most significant points of difference are to be found in scale and execution.

In applying the learnings gathered from fields including technology, science, design, digital, psychology and management, Obama for America created a new standard of best practice for political campaigning. Australian campaigns seeking to learn from the work undertaken in the US should not be overly daunted by the admittedly significant differences in the electoral systems or available resourcing.

Developing and driving issues based campaigns, organising at the community level, shifting resources and expertise to digital communication and letting data drive campaign activity are all possible in the Australian context. It requires flexibility, creativity and just enough courage from Australian campaigners to try something new.

MEETINGS

Digital

ABIGAIL CARLOZZO

Digital Director, Obama for America Florida

JOSH COOK

Digital Director, Obama for America Pennsylvania

ANITA DUNN

Former White House Communications Director

LUCAS FLEISCHER

Digital Director, Democratic National Committee

CHRIS HAAS

Deputy Digital Director, Obama for America

JASON ROSENBAUM

Digital Director, Democratic Senatorial Campaign Committee

Field & Training

BRENDAN CAVANAUGH

Deputy Issues Director, Organizing for Action

SARA EL-AMINE

National Organizing Director, Organizing for America (formerly National Training Director, Obama for America)

JASON GRAY

Training Director, Obama for America Wisconsin

KELLI KLEIN

New Organising Institute (formerly Deputy Digital Director, Obama for America Pennsylvania)

LINDSAY SILER

Issues Director, Organizing for Action

ALISON ZELLMAN

Field Director, Obama for America Pennsylvania

Data & Analytics

DAVID RADLOFF

Partner, Clarity Communications

JIM ST GEORGE

Managing Partner, NPG VAN

DAN WAGNER

Chief Analytics Officer, Obama for America

JOHN WALSHE

Chairman, Massachusetts Democratic Party

BRYAN WHITAKER

Technical Director, Democratic National Committee

ROB WINNIKATES

Online Campaign Manager, NGP VAN

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IVY LI

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