

Feedback phone banks

By Joel Bradshaw

Feedback phone banks have become a part of nearly every serious political campaign in recent years. In many campaigns these systems are the basic mechanism for voter contact. While many campaigns use some sort of phone and mail system, relatively few of them take advantage of the computer technology available to make these programs more effective and efficient.

The basic feedback phone system is a phone and mail follow up program to a specifically targeted group of voters. Often these groups are targeted on the basis of their "persuadability" or their tendency to vote in a particular partisan direction. Now, using sophisticated computer systems, these programs can target voters on the basis of specific demographics such as age, gender, date of registration, ethnic origin, property owner vs. renter, and assessed value of housing. These demographic variables are available from VCS for individual voters not just precincts.

The basic goal of these systems is to elicit information from the voters on which to base a persuasion program aimed at those individuals. The principal persuasion tool employed is not the phone call, but rather the mail that is sent to the voters as a result of the calls. Therefore, the structure of the follow up program a campaign will use defines the questions asked and the structure of the processing system. There are a variety of methods that may be used to identify persuadable voters. In some cases, a cam-

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campaign will want to assemble a broad list of undecided and favorable voters. In this case a simple "favorable, undecided, and unfavorable" schema is used to classify voters for mail. In others, gradations of leanings are also used such as "strong supporter, weak supporter, undecided, weak unfavorable, and unfavorable." These voters are then sent a piece or pieces of mail based on their support level.

Another common use of these phone systems is to identify voters' levels of concern about various issues. This information is recorded and can be used to design a mail follow up program addressing the issues each individual voter identified. This can be particularly effective when combined with voter file demographics to design multi-piece, targeted mail campaigns.

While many of the campaigns manage these systems using manual processing of the results and the follow up mail, inserting a competent political computer vendor like VCS into the process can increase the quality of the program, from list to the mailing, dramatically. The computer allows for more sophisticated targeting and list selection and does the processing more quickly, more efficiently, and more accurately so that the campaign can create and execute much more sophisticated phone mail programs.

All good feedback phone systems share some common characteristics. Phone calls are made from a list of targeted registered voters. In the VCS system, traditional electoral targeting can be combined with voter file demographics, like those listed above, to pick individual voters in the targeted precincts who meet specific demographic criteria. In addition, costs can be kept down by selecting a list of only voters with phones and, to increase the productivity of the contacts, only voters in multiple voter households can be selected.

The results of the calls are recorded, usually using a coding system on the phone list itself. It is then processed by keypunching the results and posting them to a master file and adding a code to the voter record in the master file to indicate their preference for later use. The supporters typically get a thank you letter from the candidate and the undecideds get one or more persuasion pieces of mail. The supporters also get an election day reminder mailing which, in the VCS system, can include polling place information and at least one election day reminder call.

As the sophistication of campaigns has increased over the years, some additional wrinkles have been added to the basic feedback phone program. In "leader" or "block captain" programs, the leader is asked to contact a specific number of households, usually ten or twenty, on behalf of the campaign. The campaign supplies instructions, a list of the voters, and feedback forms to be returned when the assignment is complete. VCS has designed software that, using the basic phone bank list or the voter file, will automatically assign to each leader the specified number of voters and print the name and address of the leader for use with a window envelope, along with his/her instructions. In this way, the phone bank can be used as a recruitment tool to increase activity on behalf of the campaign. Varia-

tions of this program can recruit leaders to accept yard signs or to help the campaign by volunteering in other ways.

It is also possible to combine the voter identification type of phone bank with some issue questions. This information is then recorded and transmitted with the support level data. Using laser printers and the VCS processing system, it is possible to write individual letters to the voters that vary based on both the level of support, and the issue identified. Using window envelopes and issue inserts you have a very personalized contact with the voter. The issue data can also be used to send additional pieces of persuasion mail based on the issue the voter identified.

Some campaigns have successfully used the results of feedback phone systems to raise money. In his recent campaign for the Senate, Gov. Jim Hunt of North Carolina raised sufficient funds from his phone bank to pay for the entire phone and mail effort! The method they used solicited pledges from all who indicated support, and sent to all of those who pledged a thank you note and a series of reminders.

Having looked at some of the more sophisticated options in use in phone systems, it is important to take a detailed look at the fundamental requirements for success in any phone/mail program. First, any phone bank program must relate in an integral way to the overall campaign plan. It must be seen as an important component of the total effort and not just a way to keep volunteers busy. Second, adequate resources must be committed to it to assure that the plan will be executed. Finally, there must be sufficient lead time to test all aspects of the system.

You must begin with a good, current voter file on computer in a single format. For most campaigns at the Congressional level or above, this means contracting with a firm such as VCS since the files are too large to manage efficiently on a microcomputer. Since most lists of registered voters do not have phone numbers, you may need to match the voter files with phone numbers. VCS has phones matched over 70% of the area covered by the 48 million voters currently available in its system. The average match rate in these areas is 63%. In urban areas, it runs as high as 75%.

You need a reliable corps of trained phoners and supervisors. Paid phoners are strongly recommended because they are more reliable and efficient. You will also need a central location from which to make the calls and sufficient lead time to get the phones installed. A good relationship with your local phone company will be invaluable here. In addition to the basic list from which the calls will be made, you will also need written instructions, scripts, tally sheets, and report forms.

Finally, careful attention to detail in the design of the list is extremely important. You must have in place a reliable system for processing the results. In order to avoid the costly and time consuming necessity of keypunching the names and addresses of all the voters again, each voter must have a unique affidavit number. A coding system should be

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designed to facilitate your program—the codes, and all the other information on the list, must fit on the page. If the affidavit number is next to the codes, not in the left margin, it will speed up the keypunching. Also important is the sequence in which the voters appear on the list. If you are doing a leader program, you might want them to be in street sequence. If you are calling on election day, you will want them in alpha sequence. In some cases it may be desirable to have them in phone number sequence because this will speed up the dialing process and improve the householding. Suppressing the printing of a phone number the second time it appears in a household will avoid the mistake of repeated phone calls to the same household. VCS has seventeen standard list options and can custom design formats for the needs of any campaign.

A major part of the processing of phone banks is keypunching of the results. Using affidavit numbers and pre-defined codes can make this a fast and relatively inexpensive process. VCS can do it for you or you can contract it

to a local vendor. If a campaign has IBM PC or compatible micro computers, VCS can provide you with software to do this in-house and you can transmit the diskettes to VCS. Once the keypunching is done, those affidavit numbers and codes are matched against the master files to put the code responses on the records of the specific voters. The specific follow up products, laser letters, labels, lists, etc., are then ready to be produced.

In some circumstances you might want to facilitate a phone/mail program that moves instantly from phone call to mail without additional processing. This can be a particularly effective tool when using home phoners or a cadre of interest group volunteers. VCS has designed a system using gummed labels to facilitate feedback phone programs. It uses two-up gummed labels, one with the phone number on it and one without. As calls are made, phoners apply the label without the phone number to an appropriate piece of mail (favorable or undecided) and at the conclusion of the call, the label with the number is applied to a color coded index card (green for favorable, red for undecided). The cards are then available for GOTV calling or additional follow up on the undecideds.

Feedback phone systems are very effective if the quality of the follow up mail is high and, in close races, the personal attention they provide can make the difference between victory and defeat. Executing on time is critical and taking extra time in the design of the system at the beginning to design the processing system and the list format will make a great deal of difference at the end.

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