# OBAMA BIDEN

# 2012 OBAMA CAMPAIGN LEGACY REPORT

## Introduction

**PRESIDENT OBAMA CONVINCINGLY WON** a strong vote of confidence from the American people in 2012 because, with your help, he made the choice in the campaign crystal clear – and inspired the best organizers, volunteers and campaign staff in the country to ensure voters made the right one.

The President and Obama for America illustrated the dramatically different paths the nation could follow – forward or backward – and ran proudly on a record of change and progress. In communicating the case for reelection to everyone from supporters to reporters, we knew it wasn't enough to detail just what the President had done, or all he could accomplish with another four years. We knew it wasn't enough to discuss how the President had done it, despite the perfect storm of a historic economic crisis and historic gridlock in Congress. Our campaign knew that to register, persuade and mobilize voters – in order to expand the electorate and put the President in the best position to win – we had to make sure the nation knew why President Obama was fighting to move our country forward: his belief that no matter who you are or where you come from, this is the country where you can make it if you try.

Whether they followed the heated 2012 campaign for the better part of two years or tuned in just in time for Election Day, the American people heard a lot about the what, the how and the why. This is the story of the who: the talented and tireless people responsible for building the greatest grassroots organization in political history.

**ON NOVEMBER 6, 2012**, the last day of voting in the most important election of our lives, more than 100,000 Obama for America canvassers knocked on more than 7 million doors and twice as many volunteers called voters to make sure they got to the polls. Two days later, campaign manager Jim Messina talked about the people who had just reelected Barack Obama to a second term with 332 electoral votes, a clear majority of the popular vote, and a broad coalition that reflected our changing country: "The reason they were motivated to do this wasn't because of any tactical product we gave them, or some analytical tool," he said. "They were working to build this campaign because they believed in Barack Obama and his message, and the policies that he moved forward to move this country forward. That's what won this election."

Because of your hard work, everyone who needs quality, affordable health care can count on it being there. We can keep bringing home the men and women who sacrifice for us and keep taking care of them when they return. Thanks to the countless late nights you put in, America remains a country where we are all free to love whomever we choose. Because of your energy, women's rights, civil rights and voting rights will keep moving forward instead of slipping backward. Because of your creative work, our nation's children can dream of a brighter future and businesses across the country can continue to hire, create and thrive. Because of you, we can continue our quest to bend the moral arc of the universe toward justice and make our union more perfect.

**PERHAPS THE BIGGEST SECRET TO OUR SUCCESS** is that once we started building this historic campaign in 2007 through one-on-one conversations, community by community and block by block, we never stopped. In many states we never pulled up the stakes, continuing to empower the supporters who cultivated a movement known for its strong heart, selfless vision, tenacious spirit and commitment not just to win an election, but to prove that millions of voices are more powerful than a few billionaires. Emulating the same kind of grassroots organizing President Obama practiced on the South Side of Chicago, we proved that change still comes from the bottom up. Ours was a diligently data-driven enterprise, yet always aware that behind every metric stands a real person, and behind every voter sits a set of values that sustains our democracy. It was a campaign worthy of the presidency.

Today we need your help again. The chapters that follow offer a glimpse into how our campaign operated, a brief overview of its structure, strategy and execution. We've reflected on what worked and what we wish we'd done differently. You'll read about how we trained our volunteers and armed them with the most innovative technology, how we targeted and tailored our outreach to build a coalition of constituencies, how we registered voters and then ensured their votes were counted.

But the picture we've drawn is incomplete. We need you to help color it in and bring it to life. Go to OFA.BO/LegacyStories and illustrate for us an example or two that helps tell the story of President Obama's reelection. Tell us how a tool you used made a difference in a battleground state, explain how a decision your team made saved time or resources, or share a few words about a volunteer who embodied the soul of our campaign.

As President Obama has said, "No single individual built America on their own. We built it together." The same is true of the story of this campaign: no one person is its author. Its strokes were written by all of us, working together. And that story, like our shared challenges and triumphs, is bigger than any one of us. Your recollections and lessons will help capture for posterity the story of our success.
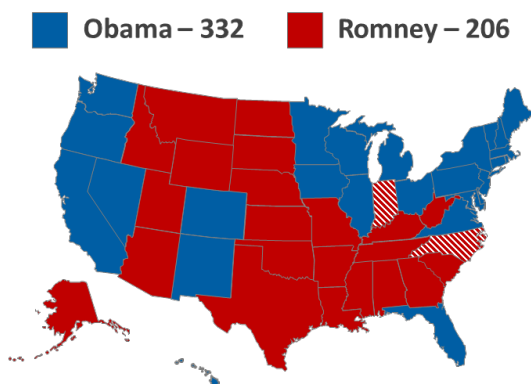
# PART I

**Our Strategy**

# OUR STRATEGY

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## Path to 270

Our goal was to re-elect President Obama by capturing at least 270 electoral votes, and our path to victory in 2012 depended on the work of thousands of supporters in all 50 states. We relied on our strongest advantages – the skills and energy of grassroots supporters around the country – to build an organization unlike any ever seen before in American politics. Along the way, we ran an innovative, groundbreaking campaign, making huge advances in areas like data, digital, technology, fundraising, communications, and political and constituency outreach. Campaign leadership ensured that all of these departments worked closely together, with no silos, to execute the same shared strategy.
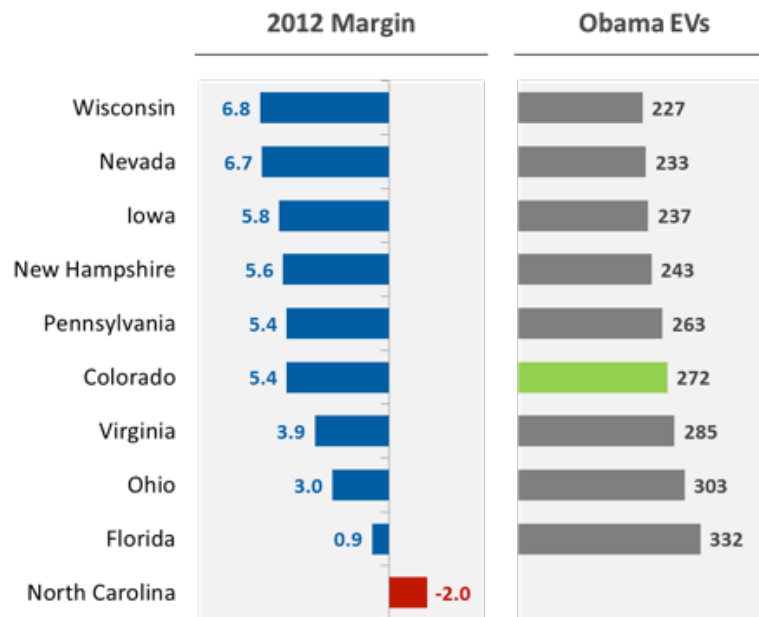
### 2012 Election Results

Obama – 332    Romney – 206

### 2012 Popular Vote

| Obama | Romney |
|---|---|
| 51.1 | 47.2 |
| 65.9M | 60.9M |
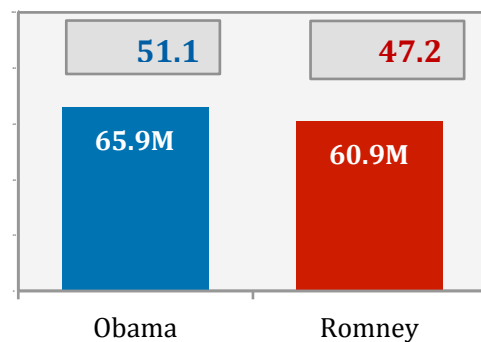
In the closest states, we built an organization to secure a majority of votes. In others, we built organizations to help the more competitive ones. That's why we had two types of state programs: battleground state programs and border state programs, both of which helped us win 332 electoral votes and a clear majority of the popular vote.

- **Battleground States:** States that were decided by very close margins (also commonly called swing states or toss up states) dedicated all of their efforts locally. They received a larger share of campaign resources, including organizers, offices, and principal and surrogate trips. States that were closest to the tipping point of 270 received the largest share of resources. We invested in an expanded list of states, such as Virginia and North Carolina, to give us as many paths to 270 as possible. Ultimately, President Obama won nine of the top 10 battleground states, and kept North Caroline close all the way through Election Day.



| | 2012 Margin | Obama EVs |
|---|---|---|
| Wisconsin | 6.8 | 227 |
| Nevada | 6.7 | 233 |
| Iowa | 5.8 | 237 |
| New Hampshire | 5.6 | 243 |
| Pennsylvania | 5.4 | 263 |
| Colorado | 5.4 | 272 |
| Virginia | 3.9 | 285 |
| Ohio | 3.0 | 303 |
| Florida | 0.9 | 332 |
| North Carolina | -2.0 | |

- **Border States:** States that were expected to be decided by a wide margin (e.g. a likely Democratic state such as California or a likely Republican state such as Alabama) built organizational strength and capacity to help President Obama win a nearby battleground state. For example, volunteers in California helped us win Nevada and Colorado and volunteers in Alabama helped us win Florida. They contributed their efforts to help turn out the vote where the campaign needed their help the most – and helped out locally by creating a lasting volunteer structure.

## Core Programs

To win a battleground state, the campaign set a goal of winning 51 percent of the vote. There are three ways the campaign could generate votes for the President – registration, persuasion, and turnout – so these became the core programs. Organization Building was added as the fourth core program because it created the incredible grassroots volunteer capacity that served as the foundation to register citizens, persuade voters and turn out supporters. These programs were shared across all campaign departments and focused everyone on the work needed to reach 51 percent of the vote in key states, and ultimately 270 electoral votes nationwide.

- Registration: Register unregistered supporters to expand the electorate and re-register supporters who may have moved at their new addresses. The registration program included tactics such as voter registration weeks of action, hot spot registration canvasses, and GottaRegister.com

- Persuasion: Persuade voters who were likely to vote but were undecided on who to support. The persuasion program included tactics such as neighbor-to-neighbor conversations, messaging trainings, surrogate events, press articles, television ads, and online efforts such as the Truth Team.

- Turnout: Educate supporters on where, when and how to vote, and motivate them to cast their ballots. The turnout program focused on early vote and Get Out the Vote (GOTV) and included tactics such as commitment cards, early vote events and rallies, and GOTV canvasses

- Organization Building: We executed the important work of registration, persuasion and turnout through a campaign-wide effort and through our most valuable advantage – our nationwide network of supporters. Organization building meant recruiting, empowering and training volunteers and volunteer leaders to build the strongest grassroots organization in the history of American politics. Organization building tactics included one-on-ones, volunteer trainings, house meetings and Neighborhood Team meetings.

Of course, everything was organization building. If we were doing something that didn't contribute to building, maintaining, strengthening or mobilizing our organization, we stopped doing it..

A summary of our key accomplishments in each program includes:

| **1 Registration** | **2 Persuasion** | **3 Turnout** |
| --- | --- | --- |
| *Register and re-register unregistered supporters* | *Persuade likely voters open to campaign message* | *Educate and motivate sporadic voting supporters* |
| • Collected 1.8M+ voter reg. forms since launch, with 1.7M+ in 2012 alone<br><br>• Forms collected exceeded margin of victory in 5 states | • Made 150M+ phone calls + door knocks, with a high % focused on persuasion<br><br>• Data and analysis ensured we talked to the right voters | • Won early vote, turning out more Dems + non-midterm voters than GOP<br><br>• Opened 5,177 hyper-local GOTV staging locations |

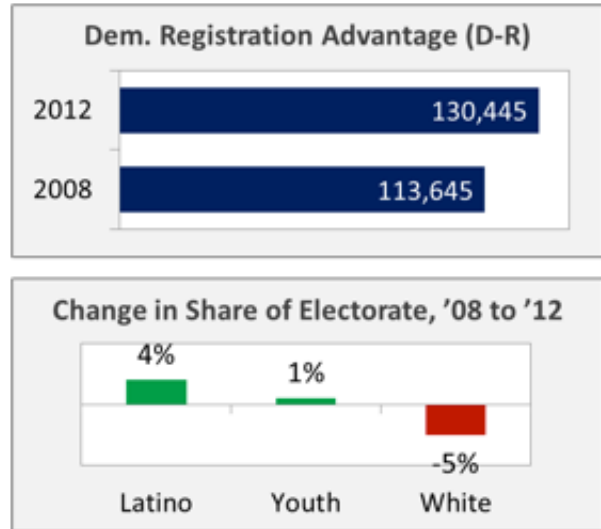| **Organization Building** | | |
| --- | --- | --- |
| *Creates foundation to execute the 3 core programs* | | |
| • Invested in 800+ offices and thousands of field organizers | • Tested and trained 10K NTLs and 30K CTMs, scheduled 2.2M unique volunteers | • Created most sophisticated training program in political history |

Every state created and updated state-specific plans to balance the core programs, which were tailored to each region and neighborhood, based on supporters' local feedback. For example, the strategy for winning Nevada included persuasion, a strong early vote program and maintaining the Democratic voter registration advantage, especially among Latinos. Ultimately, the strategy paid off as the campaign expanded the Democratic voter-registration advantage, increased the Latino share of the electorate through turnout, and won by nearly seven points

## Example: Nevada Strategy

## Example: Nevada Results (Obama +6.7)

*Summary*: **Persuasion among Democrats and strong early vote program. Maintain registration advantage, esp. with Latinos**

- Persuasion among Democrats

- Maintain Democratic registration advantage of 100K+, especially with Latinos

- Strong early vote program, since 67% of voters cast ballots pre-E-Day in 2008

- High turnout among Democrats

**Dem. Registration Advantage (D-R)**

| | |
|---|---|
| 2012 | 130,445 |
| 2008 | 113,645 |

**Change in Share of Electorate, '08 to '12**

| Latino | Youth | White |
|---|---|---|
| 4% | 1% | -5% |

The campaign organized in every part of a state to win it – in cities, in suburbs, and in rural areas – because every neighborhood was critical. Some neighborhoods, such as college campuses, focused more time on registering supporters, while others spent more time persuading undecided voters or turning out supporters. We didn't win a majority of votes in every neighborhood, but every neighborhood helped us reach 51 percent in states and 270 nationally.

# PART II

Timeline

# TIMELINE

*"Convention Watch Party attendees showed the growing enthusiasm for volunteerism. There's no doubt that we will grow teams and organize to GOTV in our community."*

**-DAVID, NEIGHBORHOOD TEAM LEADER IN NEVADA**

When President Obama was re-elected on November 6, 2012, it was the culmination of the hard work of millions of supporters. From national days of action to an unforgettable Democratic National Convention to rallies that spanned the nation, and everything in between, the road that began in April 2011 and ended on Election Night was full of unforgettable moments.

In 2008, the campaign benefited from a long, competitive primary, but faced the challenge of building a general election organization starting in June. In 2012, the challenge was the opposite – the campaign had two years to build a general election organization, but needed to generate urgency from the very beginning. This challenge turned into an advantage when the campaign launched in April 2011.

Building a campaign takes time. Starting early gave the Obama campaign a huge advantage in every respect – from building the grassroots organization to recruiting donors, engaging political stakeholders, amplifying the President's message, and developing digital and technology tools.

State campaigns were organized in phases, which built logically upon one another and usually were punctuated by big events on the political calendar. Volunteers were most likely to get involved around exciting events such as primaries, conventions and GOTV pushes. In between phases, the organization used Days of Action to keep up the momentum and give organizers high points to build toward. Finally, the campaign developed a culture where action happens all the time, even in between the Days of Action. Every state had a slightly different election calendar, but they mostly shared the following phases and key dates.

**Phase 1: 2011 (April to December):** 2011 marked the first phase of the campaign. We launched the campaign and worked to re-engage past volunteer leaders and recruit new volunteers, both online and offline. We set up infrastructure, figured out processes, and began setting strategic priorities. The summer organizer program, house parties, one-on-one conversations and planning sessions were effective tools for building the organization.

- **April 4, 2011 – President Obama launched his final campaign** by saying, "I'll need you to help shape our plan as we create a campaign that's farther reaching, more focused and more innovative than anything we've built before." The campaign starts the "I'm In" program to re-engage past volunteers and recruit new supporters. Supporters declare "I'm In," hold one-on-one meetings, organize house parties and take part in grassroots planning sessions to develop local organizing plans.

- **May 1, 2011 – Osama bin Laden killed:** President Obama announced to the country and the world that Osama bin Laden had been brought to justice.

- **May 24, 2011 – Chrysler paid back federal loans:** Chrysler announced that it has paid back its federal loans ahead of schedule. The auto rescue saved more than a million American jobs

- •   **June 18, 2011 – First national weekend of action:** Thousands of supporters came out to register voters and knock on doors during the campaign's first national weekend of action.

- **June 30, 2011 – Dinner with Barack:** The first Dinner with Barack contest ended and supporters were chosen to have a meal with the President.

- **August 1, 2011 – Summer Organizers:** The summer organizer program gave first-time community organizers the skills they needed to get their communities involved in the campaign.

- **August 4, 2011 – POUTS Birthday House Parties:** Supporters organized house parties to celebrate the president's birthday and continue recruiting volunteers to join neighborhood teams.

- **September 8, 2011 – The American Jobs Act:** President Obama laid out the American Jobs Act before a joint session of Congress.

- **September 20, 2011 – "Don't Ask, Don't Tell" Ends:** The discriminatory policy came to an end after President Obama signed a law repealing it, allowing gays and lesbians to serve openly in our armed forces.

- **October 17, 2011 – One million donors:** The campaign reached a milestone of a million grassroots donors who pitched in what they could afford to own a piece of the campaign.

- **November 6, 2011 – One Year Out Day of Action:** One year out from the election, volunteers from California to Maine headed out to register voters and recruit volunteers.

- **December 15, 2011 – War in Iraq ends:** The last convoys of American troops left Iraq, marking the end of the war.

**Phase 2:** Capacity and Team Building (January onward): As the calendar turned to 2012, we transitioned to hiring and training the first large wave of staff, writing plans and opening offices. The core goals were recruiting volunteer leaders and building the organization. This phase overlapped with all other phases until the end of the campaign because organization building never stops until GOTV, and organization building cannot be separated from voter contact and other action used to test and expand the organization.

- **January 3, 2012 – Iowa caucus:** Iowans caucused for President Obama in the state where this movement's story started, kicking off the primary season.

- **January 24, 2012 – State of the Union:** President Obama gave his State of the Union address, saying, "We can restore an economy where everyone gets a fair shot, everyone does their fair share, and everyone plays by the same set of rules."  Supporters organized thousands of watch parties nationwide.

**Phase 3: Increased Conversations with Voters (Mid-March to August):** As the Republican Primaries ramped up, the campaign increased persuasion to undecided voters, continued to register unregistered voters and began to mobilize supporters to vote. The Republican Primaries increased enthusiasm and provided opportunities to train volunteers and test the turnout operation both online and offline. During this phase, President Obama and other principals and surrogates began holding campaign rallies, which increased a sense of urgency. The communications and media teams effectively defined Romney during this time and helped amplify the President's forward-looking message for middle-class prosperity and security.

- **April 19, 2012 – Campaigning in all 50 states:** By April 2012, operations were up and running in 50 states. The campaign went on to open 813 field offices across the country. In April, supporters began monthly days of action to register, persuade and turn out voters. Volunteers organized thousands of events for days of action in April, May, June, July and August, before moving to weekly days of action after the Convention.

- **May 2, 2012 – Truth Teams:** The communications team filmed online videos to lay out the facts on Mitt Romney, Big Oil and the Koch brothers. Truth Teams would continue to fight back against untrue attacks on the President's record.

- **May 5, 2012 – First campaign rallies:** The first rallies of the campaign were held in Ohio and Virginia, drawing thousands of supporters and ramping up the urgency of the campaign.

- **May 9, 2012 – President Obama announced his support of same-sex marriage:** Supporters talked to their neighbors about what the President's support for marriage equality meant to them, their friends and their loved ones.

- **June 15, 2012 – President Obama lifted the shadow of deportation for thousands of young people:** President Obama announced a change in immigration policy to allow DREAMers to stay in the country without fear of deportation.

- **June 28, 2012 – Supreme Court upholds Obamacare:** Supreme Court voted to uphold the Affordable Care Act.

- **August 11, 2012 – Mitt Romney picked Paul Ryan as his running mate:** Mitt Romney announced his choice for a running mate, Wisconsin Rep. Paul Ryan.

- **August 29, 2012 – President Obama did Reddit Q&A:** The President did a Q&A on Reddit that becomes the biggest day in the site's history.

- **September 1-4, 2012 – President Obama's Road to Charlotte:** "We've got more good jobs to create. We've got more energy to generate. We've got more young people to send to college. We've got more good teachers to hire and we've got more good schools to build. We've got more troops we need to bring home. … We've come too far to turn back now." President Obama stops by Iowa, Colorado, Ohio and Virginia on his way to North Carolina for the 2012 Democratic National Convention.

**Phase 4: Post-Convention (September to October):** The campaign went into high gear as people tuned in more to the election following the Convention. The campaign increased registration before deadlines, organized around debates, turned out supporters for Early Vote and prepped for GOTV. This is the phase of the campaign where specifically branded Days of Action were not as important, because every weekend was a Day of Action.

- **September 4-6 – The Democratic National Convention:** President Obama said at the Democratic National Convention: "We don't turn back. We leave no one behind. We pull each other up." Supporters organized thousands of house parties nationwide to kick off the final stretch of the campaign.

- **September 8, 2012 – Voter registration drives:** Thousands of volunteers organized across the country to get voters registered ahead of deadlines.

- **September 10, 2012 – Supporters close the fundraising gap:** The campaign announced that grassroots supporters helped close the fundraising gap with Romney and Republicans in August —the first time since April.

- **September 27, 2012 – Early Vote:** Early Vote begins in Iowa and would later begin in many other states. Volunteers managed a comprehensive early vote program to encourage supporters to take advantage of the convenience of voting early.

- **October 3, 2012 – First Presidential Debate.** President Obama and Mitt Romney faced off in the first Presidential debate.

- **October 11, 2012 – Vice Presidential Debate:** Vice President Biden and Paul Ryan faced off in the Vice Presidential debate.

- **October 16, 2012 – Second Presidential Debate:** President Obama and Mitt Romney faced off in a town hall meeting with voters to debate foreign and domestic policy.

- **October 22, 2012 – Final Presidential debate:** President Obama and Mitt Romney faced off in the final presidential debate, on foreign policy.

**Phase 5: Early Vote and Get Out The Vote (October to November):** GOTV marked the final phase of the campaign. The key goals were to fill all GOTV and Election Day shifts and to provide supporters with information on where, when and how to vote. The campaign continued to drive Early Vote turnout and chase outstanding absentee ballots, where applicable. Volunteers conducted at least two dry runs from staging locations to prepare.  Finally, volunteers motivated supporters to vote, promoted citizens' voting rights, and conducted Election Day and Election Night reporting until the final vote was counted.

- **October 20, 2012:** Supporters prepared for GOTV with dry runs on October 20 and 27 – launching canvasses and phone banks from over 5,117 hyper-local staging locations.

- **October 24, 2012 – 48-hour cross-country tours:** The President took a whirlwind trip around the country: 48 hours, 8 states, no sleep.

- **November 3, 2012 – The final push:** During the final weekend, it all came down to GOTV. Volunteers knocked on doors, made phone calls and mobilized supporters to vote.

- **November 5, 2012 – Final campaign rally:** President Obama held his final campaign rally in the state where it all started, Iowa.

- **November 6, 2012 – Election Night = Four More Years:** "For the United States of America, the best is yet to come," President Obama said in his victory speech.

- **November 7, 2012 – President Obama thanks supporters and staff:** "I'm really proud of all of you," President Obama said at campaign headquarters in Chicago.

# PART III

Organization Building

# ORGANIZATION BUILDING

*"The best thing is that after all the training, team building and house parties we've had, we hit a critical mass where our teams are just owning everything we give them."*

**- BEN, FIELD ORGANIZER IN FLORIDA**

Our organization was effective because it was led by local volunteers who knew their communities. Our supporters built an innovative grassroots organization unlike any American politics had ever seen, echoing the model of the Neighborhood Teams – groups of individuals working together with a leader to organize a specific area. They broke down our registration, persuasion, and turnout goals into manageable sizes and empowered local volunteer grassroots teams to own those goals.

As the campaign transitioned from registration and persuasion to GOTV, Neighborhood Team Leaders opened 5,117 hyper-localized versions of field offices. These volunteer-led campaign hubs embodied everything the organization has always been about. The Neighborhood Team Leaders who ran the GOTV operation had been working in their neighborhoods for months, if not years.

Unlike campaigns of the past, Obama volunteers did not drive to large offices miles from their homes only to be handed a call sheet. Instead, Canvass Captains, Phone Bank Captains, and scores of local volunteers knocked on the doors of the very voters they registered, had talked to for months and knew personally. They directed them to polling locations in their communities – the schools their kids go to, the places they worship and the community centers they know well.

Building an organization like this takes time. Because we started to organize staff on the ground in April 2011, the campaign had the time to build nearly 10,000 Neighborhood Teams with 30,000 Core Team Members and we scheduled 2.2 million volunteers – 80 percent more than in 2008.

**2.2M Volunteers Scheduled**

**30K Core Team Members**

**10K Neighborhood Team Leaders**

**2K+ Field Organizers**

They worked out of 813 local field offices – more than twice as many as the Romney campaign established in the battleground states. Volunteers scheduled for shifts reported that local field offices were most important to their organizing efforts, as critical as guidance from their organizers. **More than 80 percent of volunteers reported living within 10 miles of an office.**
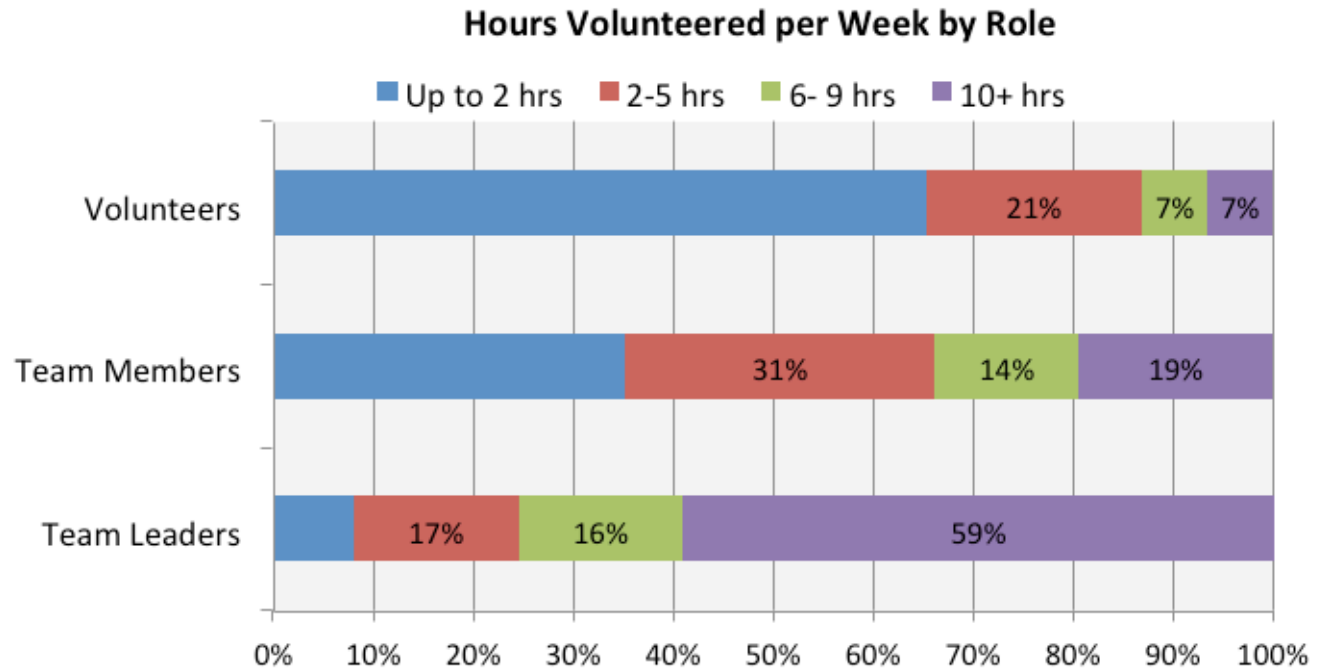
**Offices in Targeted States**

| | |
|---|---|
| Obama | 631 |
| Romney | 282 |
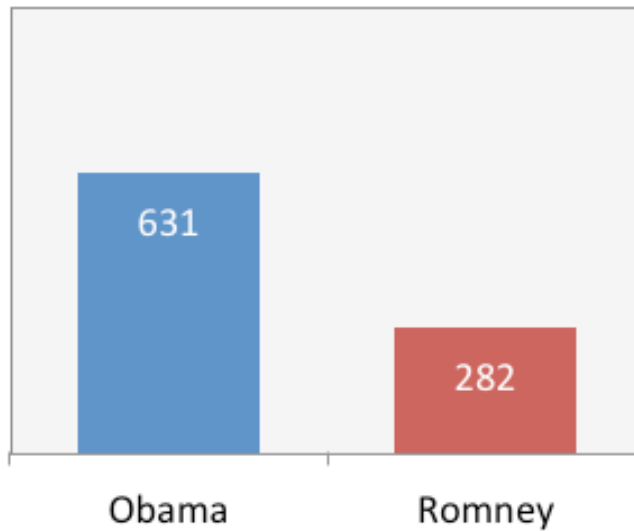
That was the difference between the Obama campaign any other campaign we have ever witnessed. The grassroots organization was people-centered and data-driven— building small, manageable neighborhood teams run by talented volunteers and supported by amazing field organizers who knew the exact number of votes they need to win in their precincts.

## Why Organize in Teams?

Organizing in teams is the most efficient, effective, rewarding and sustainable way to organize. While many aspects of team development varied from state to state, team leaders and team members consistently committed more time to the campaign. Volunteers who organized in teams spent more time volunteering than those who did not. Three out of five team leaders and one in five team members volunteered 10 or more hours per week, much more than other volunteers. Neighborhood Teams empowered volunteers to take on more responsibility and helped volunteers feel part of a movement bigger than themselves.

## Hours Volunteered per Week by Role

■ Up to 2 hrs  ■ 2-5 hrs  ■ 6- 9 hrs  ■ 10+ hrs

**Volunteers:** 21% | 7% | 7%

**Team Members:** 31% | 14% | 19%

**Team Leaders:** 17% | 16% | 59%

But the campaign's commitment to teams went beyond the needs of this campaign or this election. A team's training and relationships and sense of mission don't disappear on Election Day. By organizing neighborhoods and other communities, we built a lasting organization that can continue to fight for change. The discussion below describes the process and practices we used to build the Neighborhood Teams, recruit volunteers to serve with those teams, and support those teams' efforts to become more productive and efficient.

## What Makes a Team?

The campaign started by envisioning the ideal Election Day – an experienced Neighborhood Team Leader running a staging location along with a trained team of core members managing dozens to hundreds of volunteers during the last days of the campaign – and worked backward to achieve that vision.

Neighborhood Teams worked closely with state staff to execute specific campaign goals, including establishing clear leadership roles, identifying concrete voter contact goals and developing plans for sustainability. A fully functioning, healthy team:

- held regular meetings and communicated frequently via email, online tools or conference calls;

- self-identified as a Neighborhood Team with shared objectives and goals;

- recruited new team members and grew their ranks as necessary to reach their goals;

- recorded data to show progress toward achieving goals established by the campaign; and

- used digital organizing tools to help them achieve those goals.

## Neighborhood Team Structure

The campaign's team structure was organized according to the "snowflake model," where a team leader plays a central role but also is held accountable to the other highly trained team members. Relationships among team members held the snowflake together and ensured the team was communicating frequently and working toward common goals.

In the center of the team snowflake was the Field Organizer, who managed multiple Neighborhood Team Leaders. In addition to the NTL, each team ideally consisted of at least three Core Team Members, or CTMs: a Phonebank Captain, a Canvass Captain, and a Data Captain. Many teams had at least one other state or turf-specific CTM, such as Voter Registration Captain, Digital Captain, Youth Captain or Faith Captain.

Neighborhood Team Leaders were guides for their neighborhood teams. They managed, coached and counseled other team members and held them accountable for concrete goals. They facilitated team communication and team meetings to discuss upcoming team activity. In states with large numbers of staff, an NTL's point of contact was the field organizer. In a single-staffed, non-targeted state, an NTL's point of contact might have been the State Director.

Core Team Members took on specific roles within their neighborhood team, working directly with the NTL and other CTMs to ensure all goals were met. Like NTLs, CTMs were tested and trained volunteers who exhibited exceptional skill and commitment. While volunteers were actively encouraged to identify with their teams, only those willing and able to take on leadership roles were part of the core team as NTL or CTMs. The remaining team members worked with the CTMs to execute volunteer recruitment and voter contact and activities.

Finally, each team relied on a group of volunteers who fueled our massive growth as we approached GOTV.

While this was the model structure, in practice there were as many variations to team structure as there were teams, and no two teams functioned exactly alike.

## Phases of Team Development

Neighborhood team development can be seen as a five-phase process. Teams did not pass through these phases on a set timeline. Rather, team development was contingent on the activity of the members, experience level of the individuals, leadership level of the members and the coaching of the organizer.

**Phase 1: Potential -** At this stage there was no real team, just the potential. The potential consisted of just one or more excited volunteers in a particular turf. This was the stage for introductory one-on-ones and house meetings with the objective of finding potential core members for the team. The goal at this stage was to move people into action to then be able to coach and evaluate them.

**Phase 2: Team Formation** - This was the most common phase and one that often took the longest for a potential team to move through. Volunteers were participating in campaign activities, taking on responsibilities, and beginning to lead other team members. Organizers were looking to move people into roles, identifying candidates to coach, test and confirm.

**Phase 3:  Team -** This was the phase when a team is formed and functioning. The team had an NTL and at least one CTM, although they lacked a complete leadership core. The NTL created internal communication and accountability structures that were independent of the organizer. This team could now train new volunteers on specific organizing tactics.

**Phase 4: Developed Team** -  This phase marked the point when a team was well established, fully developed, and most productive. The team consisted of an experienced NTL with at least three CTMs and possibly more. Core Team Members were able to both function in their specific roles and move between roles when needed. These teams took on complete responsibility for organizing actions and events. The organizer functioned as a resource for the team, primarily communicating campaign activities and goals. The team set its own goals and actions within the parameters communicated by the organizer.

**Phase 5: Team Transformation -** Only large and developed teams went through this phase, and only do so when circumstances required a team to divide in two. The goal in this phase was to replicate the neighborhood team through a process of mitosis: each CTM trained another volunteer to take on his or her leadership role. The teams then split along geographic lines, dividing their turf to cover the areas more effectively. The new team then started back at Phase 2 or 3 as it develops.

Not every neighborhood team went through every phase of development in 2012. What was important was recognizing a team's phase, and working to move that team to the next phase, while also meeting campaign goals.

## Finding and Confirming Leaders

No team leader or member was given a title, but instead earned the role by demonstrating they were up to the rigors and responsibilities of the campaign. This thorough and deliberate process provided an opportunity to see potential NTLs or CTMs in action and to learn if a prospect's early commitment translated into dependable leadership. It also gave the potential NTL or CTM an opportunity to experience what the prospective role entailed and gain confidence in their ability to lead. Training was an integral part of the team development process. Neighborhood Team Conventions, for example, allowed for lateral learning and best-practice sharing, skill development training and discussion of upcoming activity.

Identifying prospects for team leadership positions meant finding someone who was willing to go the extra mile for the campaign, the President and their team. Volunteers were identified through house meetings, strategy sessions, listening tours, office walk-ins, referrals from other team members, county or city political meetings, voter contact, volunteer recruitment calls, canvassing, tabling, Dashboard, or other online leads from various tools or online programs. Once identified, an organizer was encouraged to have a one-on-one meeting with the potential volunteer in order to share personal stories, identify shared motivation, and ask for a commitment to the campaign for further recruitment or voter contact.

## Volunteer Recruitment

At all points in the neighborhood team development process, volunteer recruitment was essential. This month's new recruit could be next month's team member, and a team leader down the road. Teams at every stage of development need members and a regular pool of volunteers to make calls, knock doors and register voters. As the chart below illustrates, volunteers first become involved in the campaign through a variety of outlets.

**How did volunteers first get involved with the re-election campaign?**



- Contacted the campaign
- Donated to the campaign
- Responded to a campaign email
- Contacted by a campaign staffer
- Contacted by a volunteer
- Attended an Obama house party or volunteer team meeting
- Signed up on the campaign's website, social media, etc.
- Attended a rally or grassroots event
- Friend or family member contacted me
- Joined the Organizing Fellows program

Key opportunities and tactics for building capacity through volunteer recruitment include:

**Days and Weekends of Action** – Days and Weekends of Action helped recruit new volunteers, build momentum, and assess the strength and size of field programs. Some natural milestones were highlighted as Days of Action, including one year out from Election Day, days with Republican primaries, the President's birthday, and the anniversary of the enactment of Obamacare. The timing of these events created a focus and urgency and provided a specific request for field staff and team members to make of volunteer recruits (e.g. "Can you come help us register voters as part of the campaign's national Weekend of Action on March 13th and 14th?").

**Watch Parties and House Meetings** – Watch parties were planned around major TV events  like the State of the Union address and the presidential debates. They provided an occasion for would-be volunteers to gather with those who already were involved. Attendees learned more about the organization's goals and plans and formed bonds with other attendees. Similarly, house meetings were a way for teams to find new members in a small, welcoming neighborhood gathering that was both social and informative.

**Training** – Trainings, whether small and local or larger and statewide or regional, offered volunteers the chance to: (1) understand the purpose behind campaign actions, (2) practice and undertake such actions in a learning-based environment, and (3) get to know other volunteers with varying degrees of involvement. As with Days of Action, trainings were great opportunities to promote leadership development by asking more experienced volunteers to help plan and execute the training for newer volunteers.

**Neighborhood Team Conventions (NTCs)** – NTCs were large statewide or regional gatherings of neighborhood teams. Staff and volunteers provided skills training in small group sessions to team members and new recruits, and campaign leadership and surrogates provided strategic campaign overviews in plenary sessions. These large gatherings built enthusiasm that team leaders used to motivate volunteers and attract new ones.

**Surrogate and Principal Events** – The enthusiasm and urgency generated at surrogate and principal events often prompted supporters to commit to volunteer for the first time. Assigning staff and volunteers to canvass the crowd at these events and including a volunteer ask into the presenters' speeches were fruitful sources of new volunteers.

**Emails** – We frequently sent emails sent to volunteer leads in a particular state or region, a valuable tool to encourage them to sign up for campaign events. Confirmation calls from local organizers, whether staff or volunteers, were crucial to minimizing the flake rate for such signups.

**Other digital resources** – Some of the best sources for new volunteers were the campaign's digital resources. These include people who indicated on the website a desire to volunteer, people who responded to emails seeking volunteers, those tagged in the online database as past volunteers, and those who had newly signed up as supporters on Dashboard.

## Team Turf

Every precinct in the state was assigned to a team, leaving no block uncovered. The goal was for there to be one staging location in each team's turf, run by a volunteer team. The relative ease or difficultly of building volunteer teams varied across geographic and demographic lines. In 2012, we succeeded in building teams in a wide range of contexts – rural, urban, suburban, liberal and conservative. It was important to be aware of and sensitive to the specific strengths and challenges of each area and to adjust goals and expectations accordingly.

*Team Communication*

Setting ambitious but attainable goals was key to creating productive teams. People responded when they had a clear sense of what to aim for and a chance to achieve an objective. Goals were also an opportunity to establish healthy competition between team members or between different teams. Goals were set according to circumstance (accounting for the differences between suburban and rural turf, for example) but percent-to-goal was used as an equalizing metric. Teams or organizers who did well shared their best practices with others and took on official or unofficial leadership roles within the larger organization.

Honesty and transparency were essential to developing and maintaining strong teams. It was important for NTLs and CTMs to know that the campaign trusted them with information usually only shared with staff. In post-campaign surveys and interviews, team leaders, team members and staff cited knowing the ultimate vision for teams during GOTV as one of the most helpful pieces of information.

While numbers are the key to tracking output, the people who comprise the organization need to have fun in order to be productive and engaged for the long term. Celebrating and socializing together over victories or milestones large and small (e.g. winning an election, achieving an interim goal, marking a team member's birthday) helped strengthen the social bonds between team members and remind everyone what all the hard work is really about. When teams liked each other, productivity increased. A team assessment survey conducted in Pennsylvania in the summer of 2012 found that when teams got along with each other, they completed more events per team. They showed up to support each other.

Related to team chemistry is team culture. Seemingly small things, like identifying a team name, were important indicators of team strength. Team assessments conducted in Iowa found that three in four teams had a distinguishable team name, and those with a unique team name or identity were more likely to have weekly meetings, progress more quickly through the team phases and have excellent all-around team communication.

## Border States

Although the vast majority of staff, offices and neighborhood teams were in battleground states, border states also contributed greatly to the organization's capacity. Battleground states used significant resources from neighboring states and helped prepare for our extensive GOTV program. From California to Utah to Tennessee to New York, volunteers across the country worked hard to elect President Obama with cross-border calls and trips, helping us expand the map.

Border states exported millions of calls and thousands of volunteer shifts out of state and into targeted areas. New technology allowed for sophisticated digital and data work across borders, and an early declaration of our 50-state strategy set an expectation of participation that was the foundation of its success.

Digital organizing was a huge asset to border-state work and was very effective. Digital tools, such as Dashboard, were especially effective for organizing unstaffed turf with a lot of volunteer potential. Volunteers and staff augmented their offline recruitment with email and other digital tools like Dashboard to connect with their leaders and expand to areas where there was no staff.

## "It's big. It's important."

Thanking his campaign staff and volunteers in his acceptance speech on November 6th, 2012, the President said this to and about his team:

> "I know that political campaigns can sometimes seem small, even silly. And that provides plenty of fodder for the cynics that tell us that politics is nothing more than a contest of egos or the domain of special interests. But if you ever get the chance to talk to folks who turned out at our rallies and crowded along a rope line in a high school gym, or saw folks working late in a campaign office in some tiny county far away from home, you'll discover something else. You'll hear the determination in the voice of a young field organizer who's working his way through college and wants to make sure every child has that same opportunity. You'll hear the pride in the voice of a volunteer who's going door to door because her brother was finally hired when the local auto plant added another shift. You'll hear the deep patriotism in the voice of a military spouse who's working the phones late at night to make sure that no one who fights for this country ever has to fight for a job or a roof over their head when they come home. That's why we do this. That's what politics can be. That's why elections matter. It's not small, it's big. It's important."

The legacy of the 2012 re-election campaign was not just that America re-elected a President who would fight for them. It was that people from all around the country organized, banded together and fought for him.

The organization wants to continue that fight. According to the OFA supporter survey completed by more than 1.2 million supporters, 75 percent of volunteers, 86 percent of Core Team Members and 93 percent of Neighborhood Team Leaders want to continue volunteering as part of an Obama organization. Their top priority is continuing to support the President's legislative agenda. They are also interested in working on local community issues, training a new generation of organizers and supporting candidates in elections.

**Supporter Survey: Would you continue volunteering in your community as part of an Obama organization?**
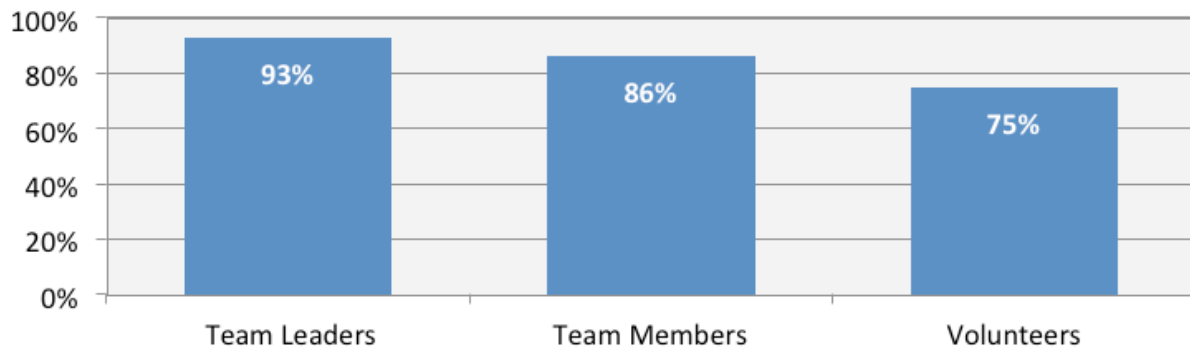


## Support from across the Campaign

Organization building was not just about the volunteer structure. The entire campaign provided support for organization building.



For example, the political team did more than just maintain political relationships – it helped leverage those relationships to grow the organization, move the message and protect the President's brand. Many political stakeholders served as "Field Ambassadors," headlining canvass kickoffs, urging their supporters to join canvasses or hosting grassroots events. The political team developed a structure that was prioritized based not on relationships but on campaign needs. It also contributed significant resources to the grassroots organization.

Similarly, every campaign event was used to explicitly promote the President's accomplishments, amplify the President's vision, generate grassroots support, get out the vote or raise funds. Principals – including President Obama, Vice President

Biden, the First Lady, and Dr. Jill Biden – headlined hundreds of events ranging from field office visits to grassroots rallies. Surrogates participated in thousands of events, reaching out to specific geographies and constituencies. Social media was far more critical in 2012 than ever before, and surrogates' tweets to their millions of followers created enthusiasm for events and policies.

The finance operation expanded the organization's capacity by delivering the funding needed to hire staff, open offices and provide resources. The finance team created many innovative programs, such as "Obama University" trainings for fundraisers, and affinity groups, such as the youth-focused Gen44 group. It also worked closely with the digital team to maximize campaign resources.

According to the campaign finance transparency website Open Secrets, Republicans outspent Democrats by nearly $100 million in 2012, funded in large part by Republican outside groups. On the other hand, the Obama campaign was funded by more than 4 million donors who made more than 15 million donations. Without the support of so many grassroots donors, the campaign could not have competed with the resources raised by Republicans, and could not have invested in the grassroots organization at the same level.

**Total Presidential Campaign Fundraising** *(from Open Secrets)*

Democrats:
- Allies: $134M
- DNC: $315M
- OFA: $716M

Republicans:
- Allies: $412M
- RNC: $400M
- Romney: $446M
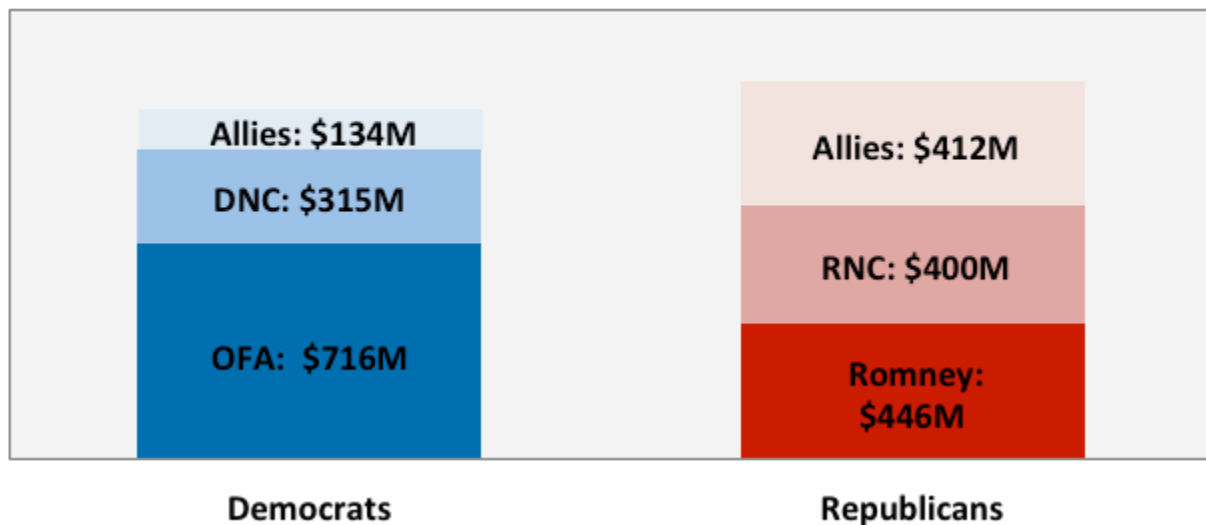
# PART IV

Voter Registration

# VOTER REGISTRATION

*"A team member told the story of how he got a man of almost 75 years of age to register to vote for the first time. The man's wife said she had been trying for years to get him to register. These are the stories that keep you motivated to go the next mile to get the President re-elected."*

**-MARGARETTA, NEIGHBORHOOD TEAM LEADER IN PENNSYLVANIA**

Voter registration was a core part of the campaign's strategy in almost every state. Leadership looked at polling, assessed current trends in the electorate, and understood the necessity of expanding the electorate. The Obama campaign then worked for months to expand the electorate by collecting voter registration forms. Running an effective voter registration program was possible only with the correct planning, organizational capacity and creative tactics.

The campaign registered 1.8 million voters on the ground, not including every voter who downloaded a form online. The campaign's voter registration numbers outpaced 2008 and exceeded the margin of victory in three key states.

| State | Registration Forms Collected by OFA | Obama Margin of Victory |
| --- | --- | --- |
| Florida | 361,176 | 74,309 |
| Colorado | 156,860 | 137,948 |
| Nevada | 95,973 | 67,806 |

No state, county or district is entirely red or blue. Voter registration can change the electorate everywhere, but in many states these efforts moved the margin of victory by multiple points. For example, in Nevada the Democratic registration advantage grew from 113,000 in 2008 to 130,000 in 2012, and the forms collected by OFA exceeded the margin of victory by 30,000. Including those who registered online, the campaign also exceeded the margin of victory with registration in Ohio and Virginia. North Carolina collected 341,000 forms – finishing in the top two OFA organizations in the country for registration and keeping the state in play the entire campaign.

The largest growth in registered voters since 2008 came from African American and Latino voters, and in the final four months of the campaign, more than 85 percent of new registrations were youth, women, African Americans or Latinos. Registration also increased among Independents – many of whom were young Obama-leaning Independents. This work changed the electorate in battleground states across the country and can continue to change the electorate in future elections.

### Voter Registration up among Latinos and African Americans since 2008

Growth in Registered Voters since 2008

| State | AfAm | Latino | White |
|-------|------|--------|-------|
| CO | 20% | 20% | 10% |
| FL | 10% | 22% | 2% |
| IA | 13% | 15% | -1% |
| NC | 9% | 55% | 2% |
| NV | 12% | 20% | 0% |
| OH | 1% | 2% | -4% |
| PA | 2% | 6% | -4% |
| VA | 7% | 19% | 3% |

### Most new registrants were youth, women, African Americans, or Latinos

% of New Registrants (Aug 1 to Nov) who are Youth, Women, AfAm, or Latino

| State | Youth (Under 35) | Women, Youth, AfAm, + Latino |
|-------|------------------|------------------------------|
| CO | 62% | 85% |
| FL | 53% | 86% |
| IA | 65% | 85% |
| MI | 63% | 86% |
| NC | 60% | 88% |
| NV | 48% | 81% |
| OH | 59% | 86% |
| PA | 73% | 91% |
| VA | 65% | 87% |
| WI | NA | 87% |

## Voter Registration Goals

After determining how registration affected turnout and persuasion in the path to victory, state leadership set voter registration goals for key demographic groups – especially African Americans, Latinos and young people. Leadership weighed the importance of voter registration against other voter contact methods and considered regional characteristics, such as high school and college campuses. Once goals were set, the campaign developed accountability within staff by introducing daily reports, reporting structures, friendly competition and internal leader boards.

## Organization Building through Voter Registration

Engaging new volunteers in voter registration activities was an effective way to introduce new volunteers to voter outreach. Among volunteers of all ages, voter registration was a favorite activity because volunteers could see that they were making a tangible difference. For example, volunteers who found it difficult to walk and knock on doors could manage voter registration tables in high-traffic areas.

Many volunteers carried blank voter registration forms with them after finishing shifts so they could continue registering voters as part of their daily routines, like running errands or attending family events. In addition, many voters registered by the campaign later became volunteers, so it was important to carry volunteer sign-up forms in addition to voter registration forms, where permitted.

In many states Voter Registration Captains were Core Team Members who boosted the capacity of voter registration programs. Empowered with this role, these captains often spent many hours seeking out additional voter registration forms through their personal networks, experimenting with creative tactics and exploring their communities for new locations for voter registration drives.

Voter registration trainings were the most direct way to improve our organizational effectiveness. It was important to the program to have voter registration trainings that were thorough, efficient, compliant and consistent. The campaign provided trainings on current voter registration regulations and laws and the required elements of the form.

## Voter Registration Tactics

Organizers and Neighborhood Team Leaders employed a range of tactics to register voters. Some of the most successful tactics included:

### *Voter Registration Drives in High-Traffic Locations*

The most consistent source of voter registration came from finding high-traffic areas such as public buildings or shopping centers that were frequented by large numbers of unregistered voters. Identifying locations that were part of the culture of the communities was key, and organizers took careful note of the most successful locations.

Volunteers found that in most communities, voter registration drives in high-traffic locations were more effective than canvassing the doors of people who were on Census lists of unregistered voters. The lists were helpful in guiding volunteers to areas with a high percentage of unregistered voters, but canvassing in high-traffic areas proved to be more productive, generating more voter registration forms per shift.

### *Events and Days of Action*

Neighborhood Team Leaders registered voters at campaign events with principals and surrogates. Similarly, voter registration Days of Action during the summer and fall of 2012 increased volunteer turnout and the number of voter registration forms collected. In many cases, however, organizers found that organic community events were the most successful forums for voter registration. Organizers registered voters at sporting events, fairs, PRIDE festivals, block parties, cultural events, concerts and music festivals, farmers markets, and countless other types of events. Events were particularly successful in rural areas, where fewer high-traffic locations existed.

### *Relationship Building*

Voter registration at is about finding voters where they are, which requires building new relationships with the community to learn about events, networks, gatherings and communities of unregistered voters. Organizers have to understand the communities they organize. Therefore, strategic and effective relationship-building is a valuable tactic as part of any voter registration program. Relationship building programs included outreach to barbershops and beauty salons, small business

owners, local elected officials, employees at key businesses, faith leaders, teachers, college officials and entertainment promoters. Building community partnerships should be prioritized and include bilingual registration materials, talking points and FAQs in Latino communities.

*Youth Registration*

Youth registration relied on providing the easiest path for students to take action. Organizers found that the most effective tactics included carrying clipboards inside student centers, canvassing dorms when permitted, tabling in campus centers to raise awareness, registering students at the end of classes, giving speeches about the importance of voter participation and coordinating with other student groups on campus.

*GottaRegister*

As discussed in the Digital section, the GottaRegister.com website was extremely effective as a one-stop shop online for voter registration information and forms. More than a million people downloaded forms on the site. The site integrated online and offline organizing, as Neighborhood Team Leaders often directed citizens to the site and followed up with leads who went to the site on their own..

*Voter Registration Auditing*

Data management of voter registration was standardized and prioritized in early stages of the campaign. A great deal of accountability was needed to ensure the campaign was abiding by all laws and regulations. Because of this, many states took on regular auditing and tracking procedures as part of their voter registration program.

For example, with unprecedented restrictions around voter registration in the state of Florida, the leadership team instituted a voter registration form tracking system and auditing process. This process included numbering every voter registration form and checking them before using them in the field. It also included a credentialing process in which all volunteers who conducted voter registration were required to attend

an hour-long training on voter registration before participating. Lastly, it included data entry of the voter registration forms and tracking which ones were actually completed during a volunteer shift.

# PART V

Persuasion

# PERSUASION

*"Barbara told me that she was undecided. As we talked, she realized that everything she believed in resonated with President Obama's vision for the future. There is no better feeling on this campaign than to persuade someone to vote for President Obama."*

**- JOSEPH, FIELD ORGANIZER IN IOWA**

The second way the campaign generated votes was by persuading undecided voters to support President Obama. As with voter registration, persuasion was a priority for the entire campaign, accomplished over time with an all-of-the-above strategy of press stories on the President's accomplishments, principal and surrogate speeches, television ads, efforts like the Truth Team, and neighbor-to-neighbor conversations.

As a result of these efforts, President Obama won decisive majorities with key groups. President Obama maintained a double-digit lead with women and expanded his 2008 margin by eight points among Latinos. President Obama also won moderates by 15 points. Self-described moderates are a better representation of the middle of the electorate than self-described independents, who are more likely to consistently vote for one party. President Obama also made gains with Asian Americans, winning by nearly 50 points.

| Group | Obama | Romney | Margin |
|:---:|:---:|:---:|:---:|
| Moderates | 56 | 41 | +15 |
| Women | 55 | 44 | +11 |
| Latinos | 71 | 27 | +44 |
| Youth | 60 | 37 | +23 |
| Asian Americans | 73 | 26 | +47 |

## Communications and Media

The campaign message frame was based on the President's vision for building an economy that worked for the middle class. The President's vision guided communications from the start to the finish, helping the campaign stay on course, avoid distractions and maintain a consistent theme. The message was repeated across the campaign, from television ads to volunteer scripts. The Obama campaign's understanding of the electorate – who they are, what they care about and where to reach them was critical to its success.

The communications team was responsible for media relations and external communications, working closely across the campaign to get out the President's message, define the opposition and shape the media environment. It worked across platforms – online, on the ground, and through the national, state, and constituency media – to communicate the campaign's core message and define Romney before he got out of the gate.

The campaign made an important strategic decision to air television ads from May 2012 through Election Day, which constantly reinforced the President's middle class-oriented narrative and defined Romney as the wrong choice for working Americans. By planning early, thinking creatively and using all of the data at the campaign's disposal, the campaign carried out media buys with an unprecedented degree of efficiency and precision, spending millions less than Romney but getting more ads in front of the right audiences. This careful planning helped mitigate the Republican spending advantage and helped frame the election on the campaign's terms.
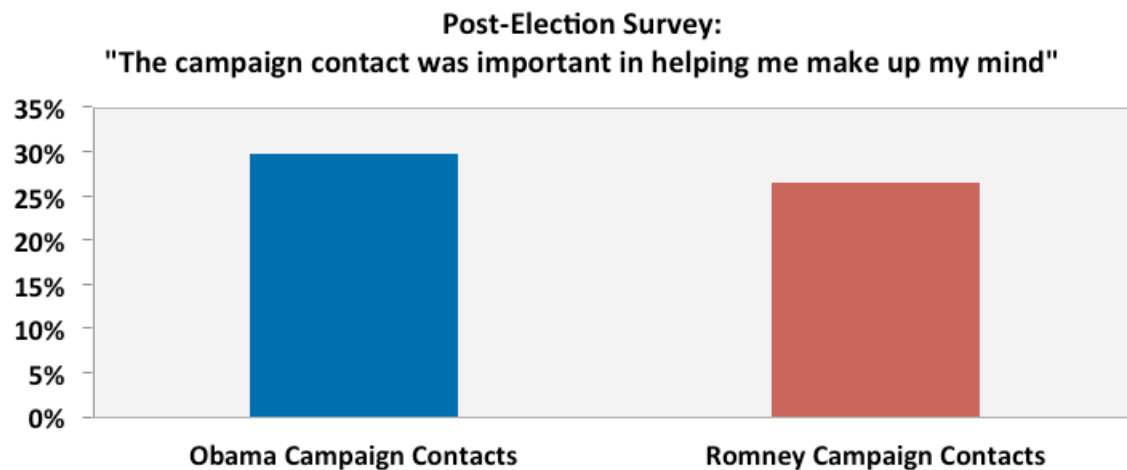
**Neighbor-to-Neighbor Conversations**

Although the communications effort was more public, the persuasion program rested on the bedrock belief that there is no better way to combat distortion and falsehood than neighbors talking to neighbors. Neighborhood Teams and volunteers understood the values, concerns and lives of their neighbors, and were the best messengers in their local communities. These conversations took place as part of phone banks and canvasses, but also as part of supporters' daily routines. Supporters often served as ambassadors for the President in their local communities with co-workers, family and friends.

The campaign's neighborhood teams allowed the organization to reach out and have persuasion conversations with millions of voters across the country. This was the campaign's most potent weapon against the Republicans' multimillion-dollar negative advertising operation, funded largely by outside money. Over the course of the campaign, volunteers recorded 150 million door knocks and phone calls, a number that includes persuasion conversations but also volunteer recruitment and turnout attempts.



Door Knocks and Phone Calls by Day (Cumulative)
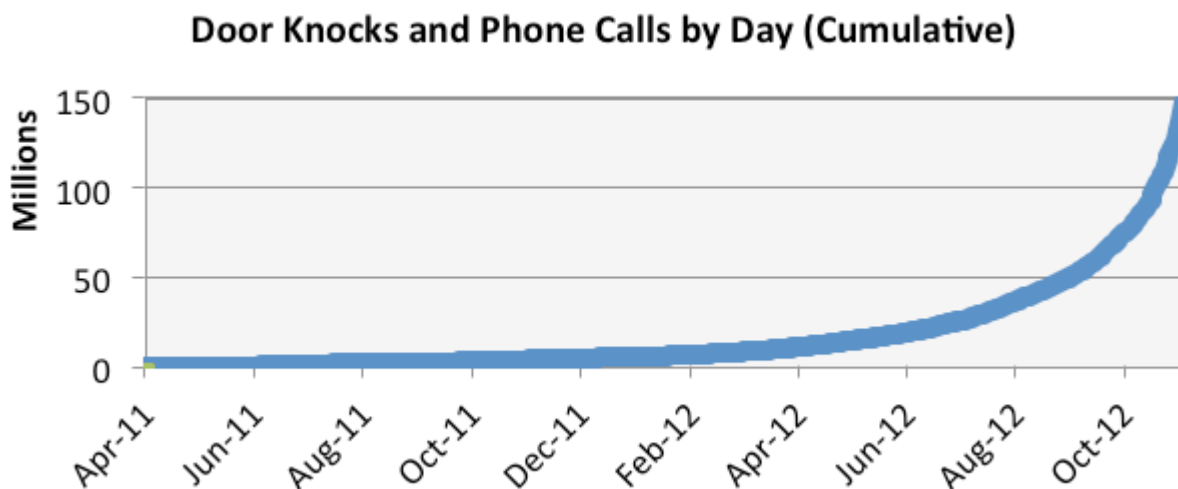
Finding the right messengers to deliver this persuasion message was critical. Ensuring that even national issues are presented in the language of the individual's own backyard was important. The bottom line was simple: the more familiar and local the messenger to the voter, the better the results. An OFA post-election survey clearly found that Obama campaign contacts were more effective in helping voters make up their minds because those conversations were conducted by neighbors talking to neighbors.

**Post-Election Survey:**
**"The campaign contact was important in helping me make up my mind"**



In addition to having neighbor-to-neighbor conversations, volunteers used the following persuasion tools:

- **Issue pages on barackobama.com**: our campaign website contained extensive issue pages that provided messaging on specific issues to voters or volunteers preparing to talk to voters .

- **Truth Team**: The Truth Team was the name of the campaign's grassroots corps comprising volunteers around the country dedicated to fighting back against untruths about the President and his positions.

- **Email Follow-Up**: Pennsylvania and Florida used an automated email program to follow up on volunteer conversations. When organizers indicated that a certain voter cared about a particular issue, the system sent an email to each of those voters with information about the President's position on it.

## Training

Training on what messages to deliver and how to deliver those messages was one of the most important elements of the persuasion campaign. Training programs taught the basic message to staff and volunteers on the ground so they could be confident they knew the basic facts about the President's accomplishments. Since many volunteers are often wary of engaging in persuasion conversations with voters, the training team developed a simple training to make it easier for volunteers to engage: The training encouraged volunteers to listen to voters' concerns, and to talk about the President's values and accomplishments in their own words.

Buy-in was necessary to make the training useful and effective. This was accomplished in trainings by:

- Acknowledging up-front that conversations staff and volunteers have with voters may be difficult.

- Describing for staff and volunteers the lay of the land and providing a context for how important these conversations are to the entire campaign strategy.

- Providing "train the trainer" trainings so that top volunteers had the big-picture view they could then disseminate throughout the organization.

## Best Practices

Across states, several best practices were identified for persuasion:

- **Keep it simple**: Simplicity should be the goal in trainings, materials volunteers take to the doors and the data-entry process. Don't train on every possible scenario, but discuss most likely scenarios volunteers will come across on the doors or phones.

- **Specialize some teams**: For teams with many undecided voters in their turf, the team structure should be adapted for a persuasion-heavy program.

- **Using border regions**: In Ohio, excess phone bank capacity in base areas was harnessed by creating "buddy turfs" so regions in areas with fewer persuasion voters could call into suburban or rural areas and reach more voters.

## Tracking Progress

Establishing and then tracking progress toward persuasion goals was essential. This allowed everyone from campaign leadership to volunteer leaders to assess our effectiveness.

Understanding how many voters needed to be persuaded was a starting point, but it was also necessary to ask key questions like "How many contacts are necessary to persuade the right number of voters?," and "What type of questions should we ask those voters during persuasion conversations?" Identifying who and how strongly a voter supports a candidate (support ID) is the most important piece of information, and is collected in every voter contact. Successful programs also chose one or two additional pieces of information to collect. For example, Ohio, New Hampshire and Florida collected information from the canvasser on how likely they believed a potential voter was to change his or her mind and followed up with voters who thought they might do so. Michigan, Virginia, Iowa and Pennsylvania collected data on which issues were most important to voters. This allowed for issue-specific follow-up messaging later in the campaign.

Each state created reports that tracked progress to goal, which helped drive strategic decisions. Data from the Ohio report, for example, helped check contact rate assumptions on a regular basis. The original assumption was a contact rate between 15 and 30 percent, but the data showed that the contact rate was lower than expected and so more attempts were required in order to have conversations with the necessary number of voters.

Many states, including Iowa and Wisconsin, collected feedback from staff and volunteers on how the persuasion program was working, which helped them determine what additional resources they needed to execute the program, evaluate how effective the training was, and see if there were any qualitative inputs that weren't being captured on walk sheets and call sheets. This information was then used to adjust specific pieces of the persuasion trainings, resources and program.

## Conclusion

The campaign knew that the volunteers would be there for the President, ready to reach out to voters on his behalf. And the campaign knew its volunteer leaders would build strong, smart teams that were ready to put those volunteers to work and have fun doing it. The campaign's persuasion program was designed to make the most effective and efficient use of those efforts by providing state-of-the-art tools, creating well-crafted and useful materials, and focusing on the voters most likely to help the President reach 270 electoral votes.

# PART VI

**Early Vote**

# EARLY VOTE

*"A man came in this morning and he was really excited to see me. He greeted me and he looked really familiar but we talk to so many people I couldn't place him exactly. Then he said, 'You registered me and I voted already by mail like you told me to.' It was an AWESOME feeling."*

**- MARCIA, FIELD ORGANIZER IN IOWA**

Early vote offered eligible voters expanded access and convenience to voting in many important states across the country. Overall, the campaign's effort to encourage supporters to take advantage of this opportunity was tremendously successful. Not only did a record number of voters turn out, but many were the voters who the campaign had specifically prioritized for early vote: sporadic supporters. In many early-vote states, Romney won a majority of the votes cast on Election Day but, because the President's early-vote margin was so high, Romney could not catch up.

**Projected Obama Support among Early Voters***

| | CO | FL | NC | NV | VA | OH | IA |
|---|---|---|---|---|---|---|---|
| | 52% | 52% | 52% | 53% | 56% | 57% | 59% |
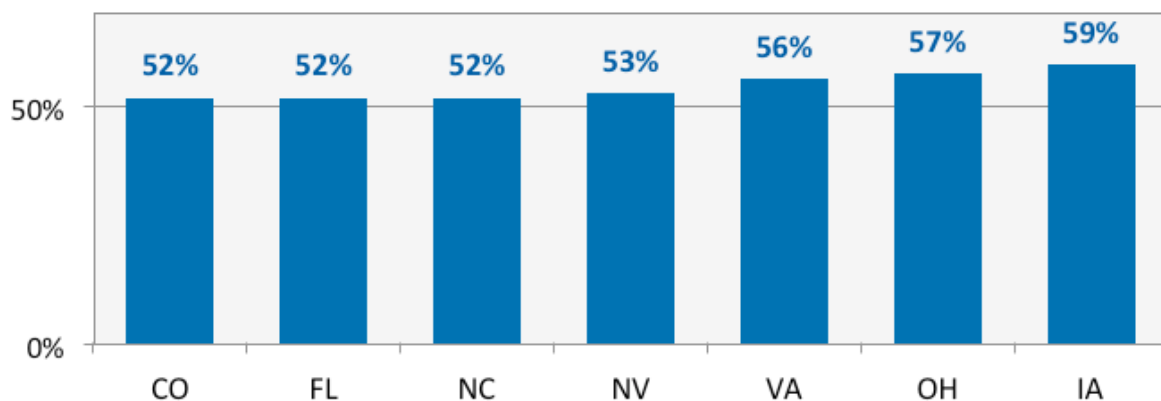
The result of all these efforts was clear: more voters cast their votes early in key battlegrounds than did so four years earlier. This achievement is especially impressive in the current context of voting rights nationally. In the years leading up to 2012, many Republican-led state legislatures tried to substantially limit voting access, and in several cases, access to early vote. Compared to 2008, many states faced a decrease in hours for early voting in person (EVIP); in Florida, EVIP was limited from 14 days to eight. In Ohio, a successful signature drive and high-profile federal court litigation won many early-vote hours back, but there were still fewer hours available and fewer weekend days to vote early.

**Early Vote as a % of Total Votes Cast**
2008 ■ 2012
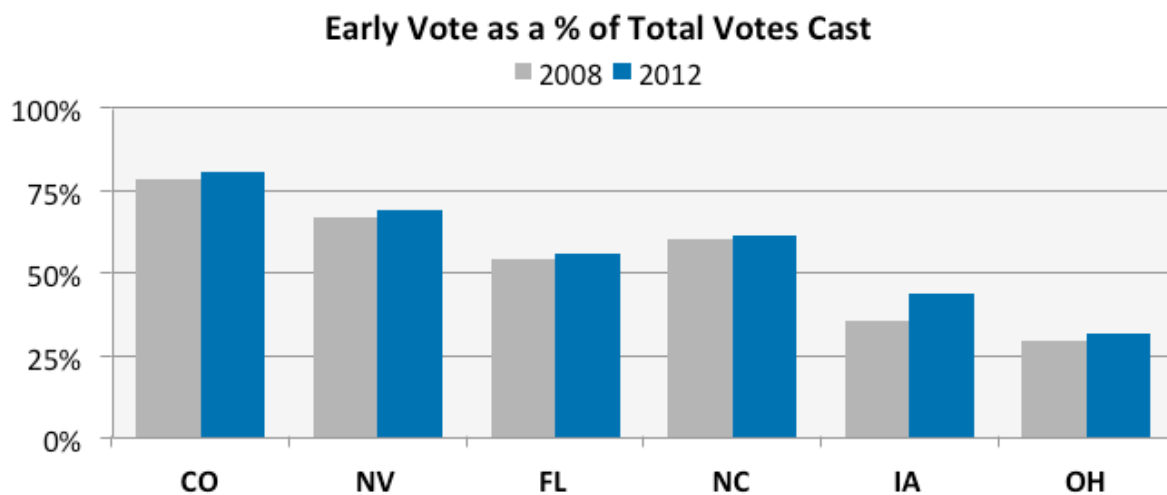


*Program Overview*

States deployed a variety of programs and tactics to achieve three major goals:

- Increase the total number of voters and the margin of votes cast early for President Obama by directly talking to sporadic supporters and creating an early-vote culture in supportive areas and markets.

  - Use early vote to enhance and display enthusiasm for the President, creating a sense of momentum in the states and nationwide.

- Use the early-vote period to test and improve organizational strength.

Early vote in the states varied significantly based on the access and availability of early vote, current election law and the existing early-vote culture. While some states – like Ohio and Iowa – were already voting in person and by mail in early October, other states – Florida, Nevada and Colorado, for example – started early vote later in October. Others – such as Virginia and Pennsylvania – had virtually no early vote. There were also great differences in how states were pushing early vote. Some focused only on early voting in-person (EVIP) while others were emphasized both EVIP and vote-by-mail (VBM).

In general there were four different kinds of states:

- **EVIP  (e.g., North Carolina, Nevada)**: These states had laws that allowed for most voters to EVIP, and enjoyed a history and culture of EVIP. Programs in these states focused on creating a narrative around EVIP, including events to increase awareness and enthusiasm around EVIP and line-management techniques for early-vote sites.

- **VBM  (e.g., Colorado)**: Some states have seen a dramatic rise in the number of voters who vote by mail; in Oregon, nearly 100 percent of voting occurs by mail. In these states, programs were implemented to encourage supportive voters take two key steps to early vote: request a ballot, and then return their voted ballot in a timely manner.

- **Both EVIP and VBM (e.g., Ohio, Florida, Iowa)**: These states implemented GOTV programs to promote different kinds of voting to different kinds of voters through various media.

- **Little or no Early Vote (e.g., Wisconsin, Pennsylvania, Virginia, New Hampshire)**: These states laws restrict access to early vote.

## Early Vote in Person

EVIP presented a rich opportunity to bank votes early, tangibly show momentum and enthusiasm, and gage the campaign's organizational strength. Almost all campaign departments played key roles: Data and Field made sure volunteers were talking to the right voters about EVIP; Communications, Operation Vote, and Political structured events to get positive coverage; Digital promoted events in order to get the online community engaged; and Operations made sure staff had the resources to keep voters in early-vote lines. Every mechanism of voter contact – phones, canvassing, digital, mail, email, paid media, etc. – was used to promote this message.

In some states, EVIP commitment cards were used when canvassing and during voter registration. The campaign found that asking a supporter to sign his or her name to commit to vote helped that voter become more likely to actually vote. Additionally, gathering these commitments well in advance of early vote provided a list of EVIP targets for follow up once early vote began.

Beyond conversations with voters, EVIP events were prioritized to generate excitement and drive earned media, which subsequently increased enthusiasm and conveyed basic information about the process. A wide variety of events were used, like marches to the polls, early vote canvass kickoffs, press conferences outside early-vote sites, early vote cookouts, ticket distribution for events near early-vote sites, and many more.

EVIP had a comprehensive online presence. For example, by September 27 (Iowa's first day of Early Vote), an online lookup tool was live on the website and returned all EVIP locations for any voter in a state where EVIP had started. Having the tool available allowed the campaign to promote it as soon as EVIP started.

## Vote By Mail

The Vote by Mail (VBM) programs sought to secure VBM requests, and then made sure voters requested mail-in ballots, completed them and returned them. Many states (e.g., Iowa, Ohio, and Florida) incorporated a VBM ballot request ask into their canvass scripts and made sure that canvassers had ballot request forms with them.

For example, Iowa found great success starting their VBM program months in advance of the first day of Early Voting. Every canvass, event and ask was coupled with a VBM application form, and it became the Iowa campaign mantra that Obama supporters should vote early. That sentiment was echoed throughout every department. For example, homes for the elderly were often open to having their residents vote by mail, a good option for a less mobile population – so our organizers visited those homes and educated their residents.

Once mail-in ballots are requested and received, voters have to complete and return them. A combination of phones, doors, digital tools and mail was used in states with robust VBM programs to ensure that ballots were returned.

## Scripts and Talking Points

All communications from the campaign focused on providing information about the early-vote process and using social pressure to encourage people to vote early. Information about the process highlighted only necessary information in the simplest way possible. Social pressure tools included: congratulating voters about being a good voter and thus a good citizen, discussing early vote as a social norm, getting a voter to commit to vote encouraging a voter make a plan, and always focusing on the ease, convenience and simplicity of the process. A common theme was: "People like you are voting early in this election. Everyone is doing it. It is simple and convenient."

Importantly, the campaign also made clear that early vote was an important part of how the President was going to win the election. The President (EVIP) and First Lady (VBM) voting early themselves helped to reiterate this message.

The campaign strived to use principal events as a way to push and promote early vote in states. Principal travel was used to encourage early vote in obvious ways, such as having giant letters that spell "VOTE EARLY" behind the person speaking and having principals discuss the importance of early vote and explain how to do it. It was also promoted in less than obvious ways, such as having all events and ticket distribution sites held within a certain distance from an early-vote site, having volunteers collect VBM requests in the lines of an event, and ensuring that the timing of the events allow for people to vote immediately before or after.

In general, using principal trips as a means to encourage early vote was almost always helpful. In Florida, in addition to having every speaker talk about early voting, voter protection staff was included in the pre-program to walk through ID requirements, location hours and other details with the crowd, and they plugged online sources of voting information.

For states with complicated programs, whether it involved roving early-vote sites (Nevada), the ability to register and vote at the same time during early vote (North Carolina, Iowa), or four different methods of voting all to be discussed at once (Florida), there must be staff and volunteer trainings that strive for simplicity.

## Organization Building around Early Vote

A successful early-vote program requires a large, well-tuned organization. Many states reported enthusiasm around early vote, translating to a significant increase in volunteer activity – even more than in the wake of the Convention. Existing volunteers devoted more time and many new volunteers came into the fold. State organization had to ensure their team structure, staging locations and other plans were ready for this influx when it happened.

Once the early-vote period started, staff had an opportunity to assess their organizations for GOTV. States looked for opportunities to use early vote to make GOTV dry runs a more impactful test for the organization. During early vote, the organization had to manage huge canvasses and phone banks, sudden and unexpected needs related to long voting lines, and surrogates and events – all at the same time.

The fewer days of early vote, the more intense the period was. Iowa, with over a month of early vote, inevitably had to plan for peaks and valleys along the way. Conversely, Florida with only eight days of early vote, treated each day like Election Day.

Inter-departmental collaboration and buy-in were critical during the planning and execution stages. All departments had important roles to play, requiring clear and consistent communication among leadership:

- **Field**: Mobilize volunteers to contact supporters and encourage them to early vote.

- **Communications**: Maintain consistency with talking points, planning key press events, updating voting information or confronting misinformation.

- **Operations**: Provide supplies for early-vote events and materials to help with line management.

- **Operation Vote**: Mobilize constituency days, liaise for Souls to the Polls events and enhance the impact on campuses.

- **Political**: Ensure local elected officials voted early and used early vote talking points.

- **Voter Protection**: Increase access to early vote. For example, in North Carolina, Voter Protection worked to increase the number of early-vote sites offered in 2012. In Florida, because of the record turnout and the decrease in days and hours that EVIP was available, a perfect storm of long lines erupted across the state. Poll watchers merged their communication systems with the field team so that whenever a line got out of hand, field knew immediately and could help manage it.

- **Digital**: Provide an array of tools and information. For example, the early vote look-up tool and the general usefulness of GottaVote.com was helpful as a specific resource with which to engage voters and volunteers online, and a place staff and volunteers could send people looking for that information.

# PART VII

GOTV

# GOTV

*"GOTV went great! It was such as great day overall and ran smoothly. Volunteers were going above and beyond, coming into the office, and going out for second and third shifts. It was great to have so many people in and out of the office all day. I also love that the polling places are on the door hangars because the polling locations have changed within the last year."*

**- HANNAH, FIELD ORGANIZER IN IOWA**

Every phase of the campaign built towards get-out-the-vote (GOTV). After expanding the electorate through registration, persuading voters to support President Obama and motivating supporters to vote early, the campaign needed to make sure that any supporter who hadn't yet voted showed up on Election Day to do so.

While simple in its goal, GOTV was a complicated and massive project requiring thousands of staff, tens of thousands of volunteer leaders and coordination with all campaign departments. At the core of this effort in 2012 were the campaign's thousands of neighborhood teams, which had been preparing from the outset to lead the GOTV effort.

Our GOTV effort was built over years and ran at full speed on Election Day. As a result, the Obama coalition turned out to vote in large numbers in 2012. Latinos and young people comprised a larger share of votes cast in 2012 and African Americans maintained their record share of the electorate from 2008.

### National Change in Share of Electorate, 2008 to 2012

| | | | | |
|---|---|---|---|---|
| Latino 1% | Youth 1% | AfAm 0% | Women 0% | White -2% |
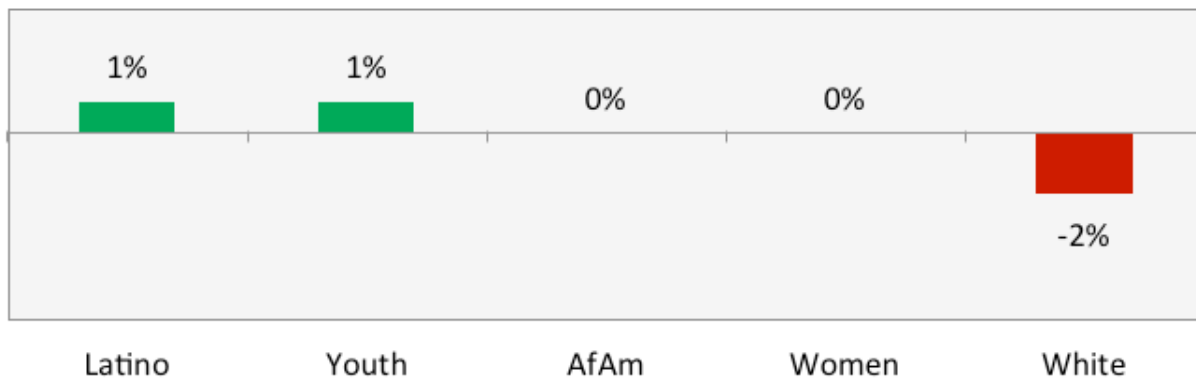
Turnout was higher in states where the campaign focused its energy. Raw turnout increased 1 percent in battleground states and decreased 2.8 percent in non-battleground states.

### Total Turnout by Battleground vs. Non-Battleground States

2008    2012

| | Battleground States | Non-Battleground States |
|---|---|---|
| 2008 | 36.7M | 94.6M |
| 2012 | 37.1M | 91.9M |
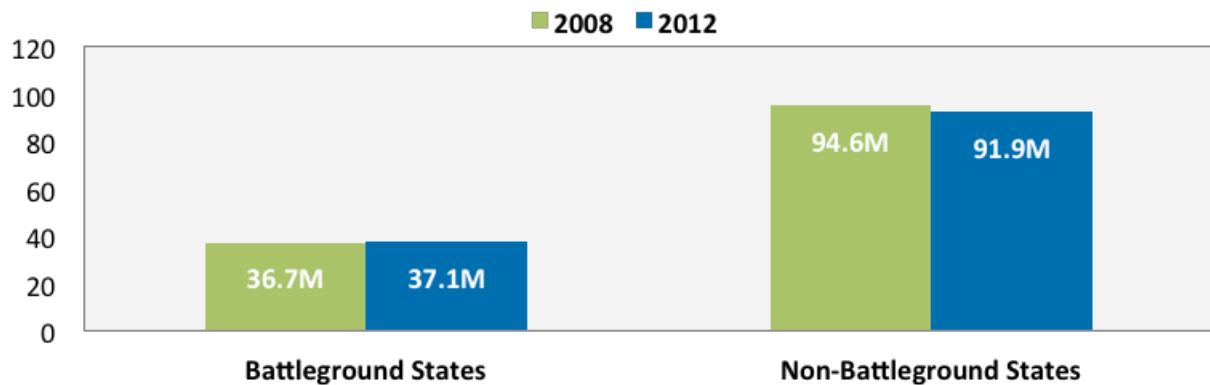
The GOTV effort had three main phases: 1) Planning, 2) Preparation and Programs, and 3) Execution.

## Phase 1: Planning

*Planning*

The campaign began preparing for GOTV from the very beginning – preparing Neighborhood Teams to transition from working out of local offices to running GOTV from hyper-local staging locations. GOTV staff were hired in the summer to begin writing GOTV plans, far earlier than in previous elections. The planning process was a collaborative effort between all departments that included shared timelines, goals, tools and strategies.

Training was an important part of the planning process. A national GOTV with state leadership training was conducted in Chicago in early August, nearly three months before Election Day. Every state held trainings to prepare staff and volunteers for the programs and expectations during GOTV. These trainings and accompanying materials supported all levels of the organization in a careful and thoughtful planning process that would ensure everything was in place to turn out the vote for the President when the time came.

With help from the data and analytics teams, the campaign prioritized outreach to voters who were likely to support President Obama but who might not cast their ballots. It included turning out newly registered voters, as well as getting sporadic voters to the polls – for example, citizens who hadn't voted in the last few elections. Given finite resources, the campaign encouraged all supporters to vote but focused the most time on reaching out to sporadic voters during GOTV.

## Phase 2: Preparation and Programs

The campaign knew that many thousands of new volunteers would join the existing neighborhood teams over the final stretch of the campaign. This meant creating an infrastructure and programs that would allow teams to most efficiently make use of the

spike in urgency and enthusiasm. Key components of this effort included staging locations, a volunteer leadership structure, shift recruitment, GOTV voter contact packets, and distribution of GOTV literature and door hangers. Each piece is examined below.

*Staging Locations*

Staging locations were localized versions of field offices that served as a central hub for a team's GOTV activities in the final days of the election. Volunteers were responsible for running staging locations under the training of the local field organizer. This would allow field organizers to oversee many staging locations and, as we would often say, "organize themselves out of a job." Logistically speaking, securing the thousands of staging locations necessary to run GOTV operations in each state was among the most important and time consuming phases of GOTV. Staff and volunteers worked to find the right spaces, execute leases, negotiate rent and properly equip the locations.

*Volunteer Leadership Structure*

The volunteer leadership structure during GOTV closely mirrored the Neighborhood Team structure during the earlier stages of the campaign. The most significant change during GOTV was the shift to decentralizing the field operation even further – from campaign offices to staging locations. Neighborhood Team Leaders transitioned seamlessly to Staging Location Directors and Core Team Members and volunteers transitioned to complementary roles they had been filling for months or years.
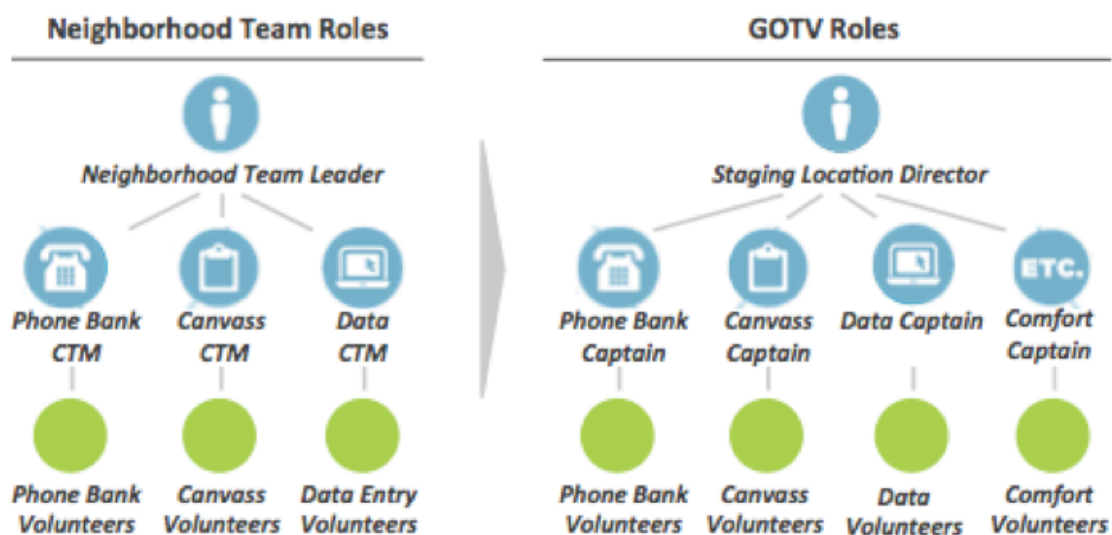
*Shift Recruitment*

No amount of planning or preparation would have mattered if there was no one there to perform the work of contacting voters once the election starts. Because of that, GOTV shift recruitment was at the heart of the GOTV effort.  Precise shift recruitment goals were set and varied within each state. Canvass shifts took priority over call shifts since face-to-face communication is more effective. GOTV shift recruitment required an all-hands-on-deck approach in order to fill the shifts needed to hit goals. In most states, all departments found creative ways to contribute to the effort. There were several areas in particular that were utilized frequently:

- **Trainings**: In many states, the field team organized volunteer trainings in their regions in advance of the start of GOTV, which provided a key opportunity to train leaders and recruit interested supporters to volunteering for multiple shifts.

- **Principal and Surrogate Events**: At events featuring principals and surrogates, GOTV shift recruitment was directly pitched by the presenters and was a focus at ticket pick-up locations.

- **Digital Recruitment**: Digital recruitment efforts included emails recruiting for specific shifts and promotion of GOTV events through social media.

- **Staff Competitions**: Each state took different approaches to encourage staff and volunteers to hit and exceed their shift goals. States had leaderboards, regional competitions, and in the most successful cases, invested all departments in GOTV shift goals.

*GOTV Voter Contact Packets*

The preparation for GOTV call and walk packets was critical to the success of GOTV. For many supporters, GOTV was the first time they volunteered, so it was crucial that all materials be as organized as possible. While the packet preparation process varied by state, it involved creating walk and call lists (generally that included room for multiple passes to minimize printing), cutting and saving turf, color-coding packets, printing back-up packets and to be stored in nearby staging locations, and training staff and volunteers how to prepare and use these packets. A volunteer who received a well-prepared and clearly explained packet would be more confident, more successful and more likely to come back to volunteer again.

## Phase 3: Execution

*Messaging*

GOTV execution begins with the right messaging frame for staff, volunteers and voters. There were two main components behind GOTV messaging.

- **Urgency**: In every state, it was emphasized that the election would be close. In most states, a reminder about the exceptionally tight, 537-vote margin in Florida in 2000 helped voters understood that every vote could tip the balance.

- **Principal and Surrogate Events**: Research underscores how useful it is to help voters make a clear voting plan, ensuring they think through the how, when and where of Election Day. This was incorporated into all GOTV scripts.

*GOTV Tactics & Methods*

Each state, region and turf required different GOTV tactics to turn out supporters to vote. State laws, geography, demographics and other factors can affect how each state executed GOTV at a local level, but an array of tactics were used widely.

- **Voter Contact Methods**: A GOTV conversation at the doors is far more effective at turning out sporadic voters than contact by phone. With that in mind, canvassing was a clear priority during GOTV, though calls were used to provide valuable additional contacts and to reach voters in rural areas or who had inaccessible homes.

- **Campus GOTV**: Voter-contact methods on a campus differed greatly to those in other communities. A few critical techniques include calls, tabling, organization mobilizing, posting flyers and coordinating van shuttles to the polls.

- **Rides to the Polls**: The Rides to the Polls program was developed and executed on a state-by-state basis depending on need and resources.

*Dry Runs*

Dry Runs are essential for Field Organizers and Staging Location Directors to fully understand what is expected of them and to identify holes that need to be addressed prior to Election Day. It is critical to have clear communication and expectations for the Dry Runs established well in advance, among all levels of leadership. This allows staff to

practice where Election Day work will take place and simulate boiler rooms at all levels (national, state and regional). The Dry Runs should then be followed by thorough debriefs. The campaign designated two national Dry Runs test dates on the two Saturdays before GOTV weekend. Some states chose to do more than two Dry Runs. In some other early vote states, Dry Runs were full-scale GOTV efforts since they were already turning out voters for early vote.

*Tracking and Reporting*

- **Turnout Tracking**: In order for national and state leadership to be able to project the likelihood of success on Election Day, national leadership decided to execute a voter turnout tracking program. This program tracked key precincts in battleground states. With this information, the data team generated reports on Election Day that allowed leadership to deploy resources if turnout was lower than expected.

- **Reporting Volunteer Activity**: A combination of nationally and state-created customized tools at the staging location level were used to collect real-time information about volunteer activity and progress through GOTV calls and door universes. States' use of these tools helped national leadership make quick decisions about redirecting resources, including border state calls, texts, the digital call tool and other digital assets like Facebook and Twitter.

- **Boiler Room Reporting**: The boiler room in each state and headquarters were the nerve centers of GOTV. The Chicago headquarters boiler room both provided information to and took in information from the states and helped make decisions about resource allocation and other needs. In each state, a boiler room comprised state leadership, received reports from regional boiler rooms and reported to Chicago headquarters. Other communication systems developed included rapid response teams (Digital, Communications, Political) and a robust Voter Protection operation.

All of these programs, processes and planning procedures were developed and implemented with one purpose – to provide our Neighborhood Teams with the resources and information needed to turnout the votes needed.

# PART VIII

Operation Vote

# OPERATION VOTE

*"We had an awesome Latinos for Obama event at headquarters!*
*It was great to see some of the same faces who were at our Latino*
*Outreach forum again tonight, hopefully they will turn out to be strong*
*prospects and a great foundation for our Latinos for Obama team!"*

**- NOEL, FELLOW IN COLORADO**

### Summary and Mission

Operation Vote was an innovation of the 2012 campaign. In the past, constituency work was primarily focused on engaging community leaders to support the campaign, to serve as surrogates for events and other engagements, and to recruit volunteers from their networks and communities. Although some of the work was aimed at supporting the ground game, it was never very systematic (e.g. program-building) or strategic (e.g. data-driven).

In 2012, in an attempt to take a different, more comprehensive approach to constituency organizing, the campaign established Operation Vote to serve as a coordinating hub for constituency outreach and organizing. Operation Vote worked closely across the campaign to initiate, plan, and execute integrated strategies to engage specific constituencies nationally and in each of the battleground states. Strategies included press amplification, targeted paid media (TV, radio, and online), large-scale events with

high profile surrogates (e.g. Maná concert with the President), and digital and field-based programs (aimed at supporting capacity building, voter registration, persuasion, and turnout).

Women, young people, African Americans, Latinos and Asian Americans and Pacific Islanders (AAPIs) became a primary focus for the campaign. Each was a critical voting bloc that together had helped President Obama achieve a decisive victory in 2008, and each played a key role in helping the President retain the White House. The campaign also determined that it needed to mobilize other important constituencies to win, including but not limited to: lesbian, gay, bisexual, and/or transgender people (LGBTs); Jewish Americans; people of faith; and veterans and military families. Examples of our accomplishments include:

- Implementing robust efforts with the Digital team to launch and support numerous "for Obama" constituency groups. These efforts generated hundreds of thousands of sign-ups that translated to new volunteer leads in the field.

- The campaign produced numerous constituency-specific digital products (e.g. microsites, videos, etc.) and a constant stream of posts on Twitter, Facebook, Dashboard, and national and microsite blogs. These efforts generated hundreds of thousands of new constituency sign-ups and produced considerable enthusiasm and interest among constituencies online.

- Developing a highly successful campaign to engage youth ("Greater Together") on college and university campuses. President Obama amplified the theme by using the slogan on the campaign trail.

- Organizing a series of Women's Summits in battleground states to support persuasion and capacity building activities among women. The summits generated thousands of new women volunteers.

- Establishing "Barbershops and Beauty Salons" and "Congregation Captains" programs to engage African Americans with the campaign. These were some of the strongest constituency-specific programs.

- Working with the media team to implement a comprehensive paid media effort aimed at Latino/Hispanic audiences in key media markets. The first paid TV buy of 2012 was a Spanish-language ad.

## Effective Strategies

Operation Vote employed several effective strategies, including:

- <u>Planning early</u>:  Teams that were able to reach out to community leaders early found more success in advancing programmatic goals. For instance, some states cultivated and built relationships with faith leaders early on and were able to establish strong, functioning faith and "Congregation Captain" programs that generated a constant flow of newly registered voters and volunteers.

- <u>Respond to policy and political developments</u>: Following the repeal of "Don't Ask, Don't Tell," the LGBT Vote team worked to amplify that accomplishment through e-mails, events, videos, social media posts and press statements. The response was overwhelmingly positive, and LGBT Vote was able to garner many new supporters through online sign-ups, as well as generate substantial positive earned media in mainstream, youth and LGBT press.

- <u>States' flexibility</u>: States had the freedom to determine the best ways for Operation Vote to integrate more closely with other departments and contribute to their local ground game. For instance, some states decided to have their Youth Vote Directors be responsible for leading a team of Campus Organizers on college and university campuses, since organizing on campuses is unique. In all cases, a strong relationship between Operation Vote and the grassroots organization was essential.

Whatever the model employed, states should have the discretion to determine what constituency organizing and outreach programs they want to implement. After all, there is no one-size-fits-all approach to the work for every state, and each state has uniquely different constituency dynamics.

# PART IX

Training

# TRAINING

> *"I finished my Summer Fellows training today and feel that it was a wonderful experience. I met people that I admire and respect and gained skills that will not only help reelect the president, but will also help me to develop my leadership skills. I am so glad that I made this commitment to Obama for America!"*
>
> **- ANNE, FELLOW IN TEXAS**

### Summary and Mission

The campaign created the first national training department in Presidential election history because we believed that well-trained staff and volunteers were our most important advantage. A national training team built a national curriculum and grew to include training staff in battleground states who adapted those programs to meet local needs. We drew from various organizing theories and modified them to best develop our staff and volunteers. For example, a key to the OFA approach was engaging supporters by listening and asking questions more than you talk about yourself.

The training department focused on four types of training – recruitment, introductory, developmental and advanced training – for three categories of people – staff, volunteers and fellows. Any given training event could be used for several goals. For example, a training to orient new volunteers could also be a chance to develop staff leadership by having them design and implement the training. Training programs also helped recruit diverse staff, retain excellent staff and volunteers, and promote an environment of excellence and learning in the Obama campaign.

| | | Type of Training | | | |
|---|---|---|---|---|---|
| | | **Recruitment** | **Introductory** | **Developmental** | **Advanced/Leadership** |
| **T y p e  o f  R o l e** | **Volunteers** | • Camp Obama<br>• Watch parties<br>• House parties / mtgs | • Voter contact training<br>• Campaign / Field 101 | • Skills webinars<br>• Team trainings<br>• Regional/statewide training | • Volunteer team summits<br>• Leading trainings |
| | **Fellows** | • Camp Obama<br>• Campus info sessions | • Fellows kickoff training | • Skills webinars<br>• One-on-one coaching<br>• Group skills training | • Promoting to staff<br>• Transitioning to volunteer leader |
| | **Staff** | • FO Academies<br>• Fellows program | • Onboarding training | • Skills webinars<br>• All-staff training<br>• Role-specific training | • Role-specific training<br>• Mentoring staff toward promotion |

## Best Practices

We learned several best practices that could help any organizing effort:

- Hire a core team early to prepare not only for the massive influx of staff and volunteers but also the full range of campaign activities as Election Day approaches.

- Emphasize training in all departments. Investing in proper onboarding, developmental, and management training for all levels of the organization will benefit campaign culture and efficiency.

- Have the technology you need to support online training and engagement platforms with many hundreds and eventually thousands of participants.

- Pay special attention to technical programs such as Data and Digital, which are outside the experience of many people and require more coaching and explanation.

A key to all aspects of the training program was the notion that training is not merely orientation that staff and volunteers undergo only at the beginning of their involvement. Training is an ongoing process that benefits both those being trained and those doing the training by providing a space for growth, healthy debate, exchange of ideas and solidification of campaign programs.

## Staff Trainings

*Use Trainings as a Recruitment Tool*

Staffing needs were large and many organizers had to be hired despite their lack of political experience. The Field Organizer Academy program was developed to bring in new candidates who might not have otherwise been aware of the opportunity. Using a combination of formal training with testing and mentorship to test suitability

for employment, the program was able to offer organizing opportunities to a wider population of the progressive community. Hosting the program in border states provided valuable staff to battleground states. A good practice was matching border state hires to turf in battleground states that was culturally analogous to their home turf.

*Staff Onboarding*

When bringing on field staff, states reported the most success when the process included a centralized onboarding training of two or three days, followed by a period of shadowing experienced staff in the field, and then individualized coaching implemented by direct managers. Onboarding training covered fundamentals of organizing, data, digital, communications, time management and planning. Having Neighborhood Team Leader panel discussions at such trainings showcased the essential role of volunteers in the organization. After centralized training, states paired new hires for a few days with quality, experienced staff for on-the-job training.

*Staff Development*

Individual coaching from managers was the most important method of staff development. Other methods that added significantly to staff development included statewide meetings, regional staff meetings, peer sharing, and online trainings. It was important in all cases to emphasize management training.

One very successful staff development program provided to HQ and state leadership was the Executive Coaching Program. In this program, the campaign recruited highly experienced executive coaches to volunteer as one-on-one coaches for staff in management roles throughout the election cycle. This program resulted in noticeably more efficient programs with higher performance, more satisfaction, and less conflict.

Other staff development best practices included:

- Decentralizing training and involve staff at all levels, using their expertise and further developing peers.

- Making use of tools such as online video conferencing, webinars, screen capture videos and file sharing platforms to share insights and resources.

## Volunteer Trainings

Volunteer training programs focused on recruiting new volunteers, introducing the organization to supporters, and further developing current volunteers and volunteer leaders. The rapid increase in staff and volunteers exceeded the capacity of the training directors, requiring other staff and volunteers to conduct trainings themselves. Developing staff and volunteers as trainers was successful because it showed them their knowledge and experience was valued, helping to further a culture of learning and feedback. Best practices for a volunteer training program include:

- Using volunteer trainings for recruitment, skill-building and leadership development of existing staff and volunteers.

- Incorporating training into marquee events like primaries and other milestones to build enthusiasm and grow the organization early.

- Identifying ways to train early and effectively on data and digital tools that may be unfamiliar or intimidating to new users.

- Developing staff and volunteers as trainers not just because you will need them as trainers but because the best way to learn is to prepare to train others.

## Fellows Program

The Obama Organizing Fellowship is the formal name for the campaign's national organizing internship program. It had a rigorous application process (less than 25 percent acceptance rate), comprehensive kickoff trainings, and full integration into the campaign's work and structure. Many of the best Fellows continued as campaign staff or volunteer leaders, hitting the ground already trained, tested and ready to go. The program provided invaluable organizing capacity, especially in the summer when many students worked as full-time Fellows. It also offered a prime opportunity for gearing up campus organizing programs, as Summer Fellows can go back to school as campaign ambassadors and recruit volunteers from the student body.
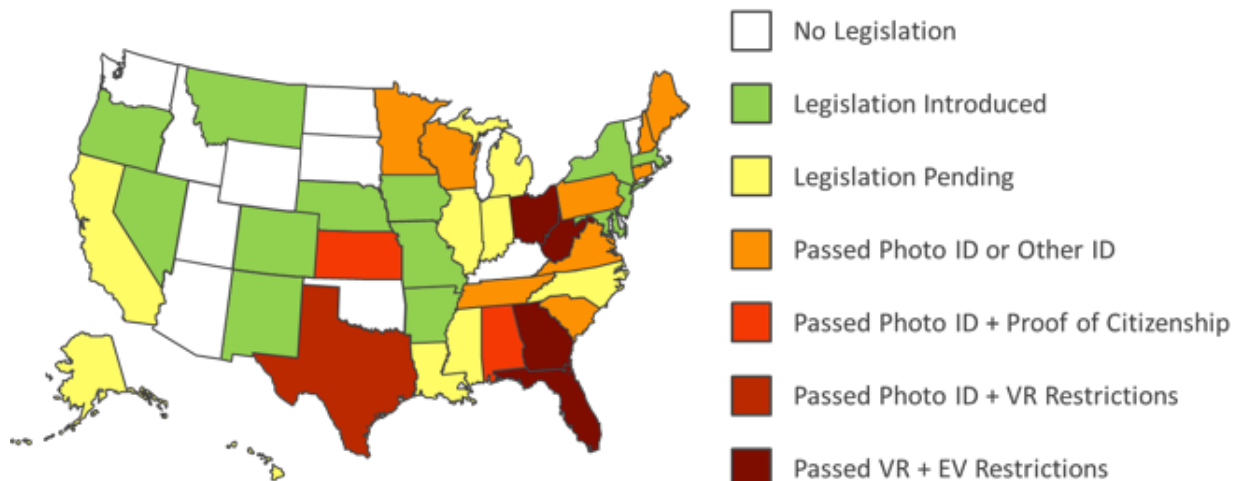
# PART X

**Voter Protection**

# VOTER PROTECTION

*"There were some problems with folks giving misinformation about when to vote. I called my field organizer and they alerted the voter protection team to resolve it for the voters."*

**-MARJORIE, FIELD ORGANIZER IN OHIO**

In 2011, more than 30 states across the country introduced legislation that dramatically shifted the election law landscape, affecting voter registration, guidelines for voting and early-voting windows. Given these new restrictions, voter protection's goal was to make voting more accessible for all eligible voters. The program started earlier than in previous campaigns, and was more integrated into the campaign than ever before.



Changes to election law introduced, pending, or passed in 30+ states

No Legislation

Legislation Introduced

Legislation Pending

Passed Photo ID or Other ID

Passed Photo ID + Proof of Citizenship

Passed Photo ID + VR Restrictions

Passed VR + EV Restrictions

The voter protection team played key roles in various states, including delaying implementation of restrictive laws. For example, in Iowa, North Carolina, Nevada, Ohio and Florida, the campaign increased access to early voting through the number of days available and the number of locations.

The voter protection team also fought back frivolous challenges to voters' eligibility, ensuring that every eligible voter could cast a vote without fear – even in states where Republican secretaries of state tried to challenge the citizenship of otherwise eligible voters. In addition, building relationships with election administrators allowed for accountability and improvements to the administration of the election.

The program focused on key goals:

- Educating voters on new voting laws and regulations for voter registration, early vote and Election Day.

- Contacting election administrators to facilitate accountability, efficiency and a fair election.

- Recruiting, training and building a volunteer attorney organization to act as poll workers and volunteers.

- Tracking legislation and litigation in key states that could decrease access to voting.

The program had major successes in helping ensure that every eligible voter could cast his or her ballot. It:

- Published comprehensive voter education information on GottaVote.com and Vote.BarackObama.com.

- Recruited 18,000 volunteer lawyers to serve as poll watchers and in other volunteer roles.

- Provided more than 300 poll observer trainings to ensure our volunteers understood the election law.

- Collected more than 19,000 incidents that were resolved at polling locations or through legal intervention.

The voter protection team used many methods to target their efforts to areas where the highest hurdles to voting had been erected. These efforts provided opportunities to resolve many election administration issues prior to Election Day. For example, the voter protection team:

- Identified priority precincts and polling locations where voter protection incidents typically occurred.

- Developed a capacity model to predict the wait times at polls based on the number of check-in stations, poll workers, same-day registration and expected turnout so they could work to reduce the lines. As the President said in his Election Night speech, we have to fix the issue of voters waiting in long lines.

- Created a tool to track voter protection incidents so they could track, assign and respond to voting incidents as they happened during GOTV and ensure all eligible voters could cast their ballots. The types of incidents were consistent across states, such as ballot shortages and other capacity issues, provisional ballot use and long wait times. Despite the fears of the voter protection team, there were not significant widespread issues with voter challenges during Election Day.

Although there were repeated legislative attempts to restrict access to voting, many states—including Ohio, Wisconsin, Florida, New Hampshire and Pennsylvania—successfully fought back restrictions on voter participation. Here are some examples:

## Voter Protection legal successes expanded voting access for eligible voters

| State | |
|---|---|
| Ohio | • OFA v. Husted restored the right of all Ohioans to early vote during the three days prior to Election Day |
| Pennsylvania | • In late September, the PA State Supreme Court held off enforcing the voter ID law in PA |
| New Hampshire | • ACLU + League of Women Voters filed litigation and won permanent injunction on implementation of residency law |
| Wisconsin | • Photo ID requirement was held for the duration of the cycle |
| Florida | • FDP filed litigation to extend early voting – keeping voting open and available on the weekend and Monday before E-Day |

- **Florida**: In August 2012, a federal judge issued a ruling lifting onerous voter registration reporting requirements and the 48-hour turnaround time on registration forms. As a result, more organizations – such as Rock the Vote and the League of Women Voters – resumed registering voters. In addition, OFA worked to increase access and reduce wait times through additional early vote sites, hours and days, as well as an in-person vote-by-mail program. During early voting, the Florida Democratic Party filed litigation to extend early voting opportunities, keeping voting open and available on the weekend and Monday before Election Day.

- **Iowa**: In Iowa, the state legislature rejected several measures to require voters to present photo IDs this election cycle and instead left intact commonsense Iowa values that allow all voters to vote without a hassle. Iowa has excellent election rules, and a bipartisan group of county auditors introduced "Precinct Atlas" – an electronic poll book and step-by-step check-in guide for precinct election officials.

- **New Hampshire**: In New Hampshire, the Republican-led legislature pushed through new photo ID and residency requirements for voters. Although the photo ID requirement will not take full effect until 2013, the residency requirement was immediate. On September 24, a New Hampshire court granted a temporary injunction, prohibiting the state from falsely telling students that if they registered to vote in New Hampshire they would then have to obtain local drivers' licenses and car registrations in order to vote in the state. The residency language also was removed from registration forms.

- **North Carolina**: In 2011, Gov. Bev Perdue vetoed a voter ID statute, which was upheld despite an override attempt by the Republican-controlled General Assembly. As a result, the requirements for exercising the right to vote were no different than they were in 2008. North Carolina also increased the number of early voting sites and hours in a number of counties.

- **Ohio**: The Republican legislature passed a law in 2011 dramatically shortening the early-vote period. Ohioans rejected these restrictions by enacting a citizens' veto – turning in more than 300,000 signatures in December to force the law onto the ballot. Republicans responded by passing another bill in May 2012 that eliminated the final three days of early vote for most voters. OFA brought suit to restore the early vote period for all Ohioans, and the District Court found in our favor, a decision affirmed by the Court of Appeals. Republicans also appealed and lost before the United States Supreme Court. As a result, every voter – including members of the military, veterans and overseas citizens – had the same opportunity to vote early during the final three days before Election Day.

- **Pennsylvania**: Even though Pennsylvania enacted a photo ID law in 2012, it had little practical effect as a result of the final court decision in Applewhite v. Commonwealth of Pennsylvania. Ultimately, the ruling meant that Pennsylvania voters were able to vote on Election Day in Pennsylvania in the same way they had in previous elections.

- **Wisconsin**: In 2011, the Wisconsin legislature passed an omnibus election law bill that made voter registration more difficult, enacted a strict photo-ID requirement, and pushed additional restrictions on the alternative balloting processes. In response, the campaign created the "Own Your Vote" program to educate voters on the election law changes. Importantly, a state court found the bill's voter identification provisions unconstitutional and they were not in effect for the November election.

# PART XI

Digital

# DIGITAL

*"Today was a good day. I had two one on one's. One was with a guy who has never been involved in politics, but is willing to help with digital and social media outreach for our team. He has been posting facts from the Truth Team to his Facebook page, sharing the President's accomplishments with his network.*
*I asked him to do the same for our team."*

**- RYAN, FIELD ORGANIZER IN OHIO**

## Overview

Through strong and persistent fundraising, messaging, and organizing operations, the digital program engaged supporters with effective and simple ways to help win this election in their own communities. The digital program was the most complex digital operation any political campaign has ever seen, and decisions were driven by rigorous testing and clear metrics.  The digital program operated on a fundamental belief that it would not leave any voter, any volunteer or any opportunity for supporter engagement on the table. This approach widened the gap between the two campaigns leading up to Election Day.

The goals of the digital program were no different from goals across the campaign: recruit and organize volunteers, register voters, persuade voters, turn out the vote and raise money to help pay for it all. The department did not have goals for application

downloads or traffic, or friend/follower growth. Those sorts of metrics were helpful as leading indicators of our performance to core goals, but not in their own right.

While the goals have remained the same, the technologies certainly have developed. In 2008, Facebook, Twitter, and smart phones were in all in their relative infancy. Today, President Obama has more than 34 million friends on Facebook alone. Those 34 million people are friends with more than 98 percent of U.S.-based Facebook users – more than the number of people who vote. In a time where many voters are skeptical of political communication but trust the views of their own friends, this was incredibly important.

Working closely the campaign's Technology team, the Digital team expanded and engaged online communities of volunteers with innovating tools like Dashboard and the Call Tool. The program also drove voters to new sources of voting information online, like GottaRegister.com and the campaign's polling place and early-vote location lookup tool. All of these sites provided innovative ways for users to share information and connect with their friends, bringing more and more people into the organization.

In addition to the national program, each state ran its own digital program. These programs produced content related to state-specific election deadlines, regional messaging and promoting field priorities. Having individual programs based in every state enabled the digital department to work on state-specific issues like the revival of the auto industry in Ohio, or Latino-specific messaging in Nevada.

Everything the Digital program did fit into one of three priorities: fundraising, messaging, or organizing.

## Fundraising

As with any campaign, fundraising was critical to victory. This election, however, came with its own share of challenges.

The Supreme Court's decision in Citizens United gave powerful players like Karl Rove, the Koch brothers, and Sheldon Adelson a louder voice in the 2012 election, opening up the possibility of virtually unlimited cash for the other side. The Obama campaign needed to raise a lot of money from small-dollar donors in order to be able to play at the same level.

These challenges meant that the digital program couldn't rely on the 2008 playbook. The program would have to do much more than pick it up, run the same plays and expect to be successful. To win, Digital would need to convince supporters their $5 would make a difference, and to prioritize fundraising over other objectives when needed. And they did: millions of people invested in the campaign, helping us hit our fundraising goals and build the organization.

To do this, Digital built an almost-obsessive culture of optimization. The development and analytics teams worked to optimize every donate page and the email team would test up to 18 different messages on fundraising emails. This type of A/B testing was everywhere. Sometimes, these tests were merely to provide a short-term lift, often around the margins. But many yielded longer-term lessons that wound up guiding the program. In one particular test, A/B testing showed that the worst performing email segment would have left more than 80 percent of the revenue on the table.

## Messaging

Amplifying the message of the candidate is a central role of a campaign. Digital helped communicate a consistent message that framed the candidate and the state of the race, and also made sure that message was captivating enough to share. To do this, the digital team needed to build an authentic community of supporters and motivate them to play a part in the process. This meant finding compelling, creative

ways to talk about the President's accomplishments, while continuing to explain why Mitt Romney was the wrong choice to lead the American people. If Digital succeeded, the community of supporters would serve as further amplification: they, in turn, would help broadcast the campaign's messaging to their own networks.

Depending on the type of information at hand, Digital broke down messaging into three types of pushes.

- A promotion of planned events or products to support the campaign's message of the moment, in coordination with the communications team. Examples over the course of the campaign included positive pushes surrounding the American Jobs Act, the State of the Union, and pushing accomplishments like Obamacare and LGBT rights. On the contrast side, the campaign framed Romney's time at Bain Capital, got the word out about Romney's Massachusetts record, tore down Romney's tax plan, and pushed Romney and Ryan's self-described "severely conservative" records.

- Rapid response to attacks by the Romney campaign on the President. These typically included videos, sign-on pages, emails, blog posts and Truth Team content.

- A revitalization of existing content to reiterate past messages within the campaign's overarching frame. Following large-scale events like the debate or the convention, the campaign experienced a quiet period where returning back to our key messages was crucial.

## Organizing

Digital organizing helped bridge the gap between the online activity and offline action. The Digital program strived to meet supporters and volunteers where they were and move them up what was known as the "ladder of engagement." This meant that supporters were asked to take actions similar to ones they had taken before, but that were considered a bit more involved. As they participated, supporters would increase their participation online and on the ground.

Innovative online tools and tactics were force multipliers, allowing the campaign to engage a large number of people in creative ways, leverage the social graph of our supporters and ultimately build the grassroots power.

Digital evaluated successes on a daily basis both quantitatively and qualitatively. Quantitatively, the program looked at how many people took action, how many

people took a more difficult action than they had before, and how many people moved from an online to offline volunteer. Qualitatively, the program spent a lot time soliciting and sharing the stories of supporters, both publicly as a messaging technique and internally with staff to demonstrate positive results from digital organizing techniques.

The timeline for the digital organizing program was set in early 2011 in conjunction with the field team and shared the same clear phases that the entire organization followed. It was important to lay out these phases clearly, communicate those phases to everyone and establish clear goals that lined up with each.

## Organization Building

Organization building came both from casting a wide net to engage a large number of people and from building the infrastructure to capture the energy of the most engaged supporters.

Building lists and audiences on every channel allowed the campaign to make a relevant ask of supporters. Digital was able to bring supporters on board with low-intensity actions on the platforms they were already on.

The easiest was a simple request to sign a petition or sign-up through another form. Early in the campaign, new supporters were mostly directed to the "I'm In" form. When people self-identified as "in," they were part of a smaller group of "active supporters" that would be coached to move up the ladder of engagement. By the end of the campaign, more than 17 million people had been active on the email list.

Digital also built infrastructure to harness the capacity they were helping build. The program did this in two ways: by making sure that the field team had all the data for the people who had taken action and wanted to get involved, and by building tools that empowered people who wanted to take action to do so online.

The first part – making sure supporters and volunteers could be easily identified by the campaign in the field – required a complex map of data integration between several different databases. This meant that supporters who signed up online were passed to the appropriate field organizer in their local community. This allowed organizers to make online sign ups part of their volunteer recruitment list. The campaign's events management system sent RSVPs through a similar sync. Throughout the campaign, more than 300,000 events were held, attended by more than 1.2 million people, many of whom came from online mobilization.

The second part – engaging volunteers in their own homes – required full engagement programs around our online tools. Dashboard, call tool, our events management system, and open graph are some examples of these tools that were crucial to building our capacity.

## Voter Registration

All online voter registrations were funneled through GottaRegister.com. Because of the varying voter registration laws and state-specific deadlines, each state's voter registration program was uniquely designed.

Data indicated the majority of the campaign's email list was registered to vote, so the online program empowered them as messengers and organizers, and supporters were asked to tell their friends to get registered. This was one of the first uses for Facebook targeted sharing.

In addition to GottaRegister.com, the Digital program was an integral role in recruiting for voter registration drives and messaging to supporters in key states around the deadline. As a result, more than a million people filled out a voter registration form online. These voters helped make up the win margin in key states across the country.

## Early Vote and GOTV

Early vote was a key part of the campaign and essential to victory. Because the laws in each state differ so dramatically, this program varied state-by-state. Some states developed a state-specific early vote brand. For example, Iowa used "Be the First" and Ohio used "Ohio Votes Early."

The digital program also focused on making early vote the right, easy thing to do, by telling stories of people who voted early and using a lot photos and graphics to make early vote feel like the norm.

The digital program had a few basic GOTV asks: make calls, share with your friends, go to a staging location and go vote. The approach was based on the premise that the vast majority of supporters on the list were likely to vote, so it focused on asking them to tell their friends to vote.

## Conclusion

The digital program was a key part of the success of the 2012 campaign. The digital program took risks to invest in new areas and ideas and that paid dividends. As a result, the campaign was able to engage more people, build a community of online supporters, and empower those supporters to make a difference. Digital will continue to be a foundation of campaigns of the future to engage the existing supporter base, find people online and move them up the ladder of engagement.

# PART XII

**Technology**

# TECHNOLOGY

*"I'm working with a person who is bed-ridden with cancer but who wants to volunteer. I've been exchanging messages with him through Dashboard, and I've been walking him through how to start making phone calls using the call tool. He's excited that he's able to contribute something to re-electing the President."*

**- BOB, NEIGHBORHOOD TEAM LEADER IN CALIFORNIA**

## Summary and Mission

Technology played an unprecedented role in the 2012 campaign as a true force multiplier. The Obama Campaign brought in a different and higher level of technical talent from outside politics so that we could integrate product development with subject-area political expertise. For example, talented developers worked closely with organizers and volunteer leaders to assess their unique needs when developing Dashboard – the Campaign's online organizing tool. This enabled opportunities for real innovation, such as the use of analytics to drive electoral strategy and the creation of products like Dashboard, Narwhal, and Targeted Sharing. Looking forward, technological innovation will continue to be a core component of successful campaigns.

## Effective Strategies

The first thing the technology team focused on was our platform because we needed to build the technology that would host and support all of the subsequent applications. Shortly after, we began building important campaign applications, such as the online store, GottaRegister.com, and Dashboard. As we approached GOTV, the most important milestone was making sure that our technology didn't fail. Once an application proved to be resilient, we understood that it had reached its last milestone and was ready to support our most important work. We developed many products using these methodologies, and had a number of big wins. Here are a few:

- **Identity**: One of the biggest problems at the start of the campaign was that each application required multiple user accounts and passwords. In May 2012 we let all users own a single identity, resulting in increased convenience, signups, logins and stability for the duration of the campaign.

- **Dashboard**: Although the Dashboard launch was later than hoped, it turned out to be a great way for volunteers to organize online. There are many accounts of how users who used Dashboard were more productive and how people who normally couldn't volunteer were able to do so, such as rural users who were far from a field office. During GOTV, we used Dashboard to send about 3 million messages to its users.

- **Narwhal**: From a pure technology standpoint, this allowed us to move faster with more stability. Narwhal allowed us not to have downtime during GOTV.

- **Integration**: Our data integration system solved a problem that organizations all over would love to solve: We were able to take data from all of our disparate systems and merge them, allowing more people to be better contacted. In the end, this data was more reliable and more accurate than previously built systems.

- **Voter** Tools: During GOTV we made 3 million calls with the call tool. During voter registration, we registered more than a million voters. The tools were fast, reliable and consistent.

- **Downtime**: For the month of October, we tested and failed our applications constantly. We failed every aspect of the application and its systems to understand exactly how it would fail and how we need to react and rebound. This allowed our engineers and teams to ensure we wouldn't go down during GOTV.

## Opportunities

Of course, there are opportunities to continue to innovate. A few recommendations for the future are:

- **Look to users for guidance**: We found that once we spent time with volunteers and learned how they were interacting with the software, we could better tailor our development to what people actually needed. The users' needs and the user experience should be central to any technology developments.

- **Departmental integration**: The technology organization was largely a service bureau to the rest of the campaign, which was a sensible structure for a new entrant into the campaign environment. Looking forward, further integration of technology would be beneficial. For example, we could insert experienced technology product managers into each department to help coordinate technology requests.

Ultimately, while there were challenges in developing and integrating a department that was so new to a political campaign, the technology department was able to build a large enterprise platform and several important products that enabled users to execute on the most important work.

# PART XIII

Data and Analysis

# DATA AND ANALYSIS

*"I spent the early morning learning a basic introduction to use data tools. Learned how to pull lists and use existing scripts. Very exciting and helpful."*

**- GARETH, VOLUNTEER COORDINATOR IN SOUTH CAROLINA**

The campaign was metrics-driven – guided by the belief that decisions should be informed by data and that programs should set and achieve quantifiable goals. As a result, data, analysis and reporting played an influential role across the campaign. The campaign developed a data-driven culture and deployed sophisticated data tools and teams, helping create efficiency throughout the organization.

Data and analysis were used to achieve the following successes:

- Helped direct campaign resources towards the most efficient areas for voter registration, persuasion and turnout, including early vote and vote by mail – making better use of volunteer time.

- Employed data tools to empower volunteers to be data-driven. Trained volunteers and organizers to use data systems such as Votebuilder to contact the best lists of potential volunteers and voters.

- Increased the efficiency of television advertising buys by at least 10 percent compared to the Romney campaign. Achieving a lower cost-per-ad ratio meant more resources could be spent on state programs.

- Accurately predicted the election result within a single percentage point in most battleground states.

- Used tests to estimate the value of key actions. For example, we quantified the effect of a GOTV contact on turnout.

- Based on estimated support, we evaluated how many votes a single GOTV contact earned, which motivated to volunteers helped run the program more efficiently.

The primary metric the campaign used to chart success was vote share in battleground states, which helped us stay focused on achieving 270 electoral votes. A number of important metrics shared by all departments drove those topline numbers – including funds raised, volunteer shifts scheduled, voter registration forms collected, voters contacted, political and constituency leaders engaged, and a host of digital metrics. Campaign leadership reviewed these reports on a daily basis. Ultimately, campaign leadership focused on the number of early and mail ballots cast by Obama supporters and the number of Obama supporters who are registered to vote in battleground states, since these metrics connect directly to election results.

## Access and Training

Unlike many previous campaigns, the Obama campaign trusted and empowered volunteers with access to campaign databases. Volunteers interacted most often with the Voter Activation Network (VAN), a database loaded with voter files of registered voters and volunteer lists. On their first day as a part of the campaign, volunteers and organizers were taught that if their data wasn't entered into VAN, it didn't exist. The campaign relied on real numbers, not estimates. At the end of canvass and phone bank shifts, volunteers entered the results into VAN so that they could track their progress toward their registration, persuasion and turnout goals.

Because of the distributed access, the campaign valued training in data and analysis. Good training ensured that staff and volunteers would be invested in the program and be able to see the result of their work. Data trainers executed several different types of trainings: large group trainings for new organizers, small group trainings to go in-depth on concepts, one-on-one trainings and online trainings. The states that provided regular access to data trainings and open communication consistently had stronger neighborhood teams.

## Goals and Planning

Part of managing a data-driven campaign was establishing realistic and challenging goals. Organizational goals varied from state to state, but a starting point for a lot of state organizations centered on ratios of staff to volunteer teams. As staffing ramped up or adjusted, so did the Neighborhood Team Leader (NTL) goals per staffer.

In addition to leadership goals, benchmarks like the one-on-one meeting goal were important to the recruitment and maintenance of relationships of Neighborhood Team Leaders and Core Team Members. Identifying goals early gave field organizers general guidance as to how to spend their time efficiently.

Some metrics were more important than others in gauging the impact of the organization. Attempts (knocks and calls) were an indicator that work was being done by an organizer or a team, but attempt were not the best way to assess organizational impact. At the end of the day, reports focused heavily on the number of conversations volunteers had on the phone or at the doors, which helped the campaign chart whether it was achieving the contacts necessary to win votes.

All battleground states had at least three core lists of voters to contact: volunteer recruitment, persuasion and GOTV. The data program produced lists that were contactable, didn't interfere or overlap with concurrent programs, and maximized the efficiency of the organization. When creating a list, the state data staff had to consider how a universe would be contacted, what other types of contacts were ongoing, and how best to avoid double contacts. The data program helped organizers effectively plan and prepare for their volunteer shifts.

In states with large voter registration programs, the data program was focused on tracking progress to goal, working with the Voter Protection department to manage data according to all regulations, and to create tools for the organizers to improve their efficiency. Being able to track and analyze the number of cards collected at a specific location was helpful to prioritize areas that were returning the most forms per shift.

## Reporting

The Obama organization has always existed as a data-driven organization. Reports produced by the data program provided information that informed programmatic decision-making on the budget, staffing and resource allocation. Data staff in most states developed, maintained and monitored the content and effectiveness of their reports through constant communication with stakeholders.

The data program helped provide programmatic guidance by measuring quantitative outputs against previously set goals ("percent to goal"), sometimes as specific as the precinct level. The campaign produced a daily topline report for each department that contained progress to goal for a variety of voter contact and organizational building metrics. As a result, the data program helped make excellence a tangible and achievable goal.

# FORWARD

*"Tonight,*
*more than 200 years after a former colony won*
*the right to determine its own destiny, the task of*
*perfecting our union moves forward.*

*It moves forward because of you.*
*It moves forward because you reaffirmed the spirit*
*that has triumphed over war and depression, the spirit*
*that has lifted this country from the depths of despair*
*to the great heights of hope, the belief that while each of us*
*will pursue our own individual dreams, we are an American family,*
*and we rise or fall together as one nation and as one people.*

*Tonight,*
*in this election, you, the American people,*
*reminded us that while our road has been hard,*
*while our journey has been long, we have picked ourselves up,*
*we have fought our way back, and we know in our hearts that for*
*the United States of America, the best is yet to come."*

**- PRESIDENT OBAMA, IN HIS NOVEMBER 6, 2012 ELECTION NIGHT SPEECH**

OBAMA BIDEN