PROTEUS FUND and the
Funders' Committee for Civic Participation

VOTER ENGAGEMENT EVALUATION PROJECT (VEEP)

Top Ten Lessons for Funders
regarding §501(c)(3) voter engagement work
conducted during the 2004 election cycle

Heather Booth and Stephanie Firestone
June 2005

Funders supported an unprecedented level of §501 (c)(3) voter engagement activity in 2004. This funding produced significant gains in voter registration and turnout among most of the underrepresented constituencies that were its focus.[1] Funders encouraged innovation and experimentation, promoted greater accountability, and advanced strategic planning and collaboration as never before. Consequently, §501 (c)(3) voter engagement programs expanded significantly. There is a great deal to learn from and build on for even greater impact in the future. We present this initial list of "top ten" lessons to prompt discussion and provide guidance to funders regarding ongoing support for nonpartisan voter engagement work.[2]

Top ten §501 (c)(3) voter engagement lessons from 2004[3]:

1. **Effective voter contact is up close and personal**
2. **Build it (strategically) and they will come**
3. **Voter engagement is part of a permanent campaign**
4. **Ready, set, plan**
5. **Voter files are the fuel that drives voter contact**
6. **Voter protection must be front loaded**
7. **Repeat the message, then repeat the message**
8. **Collaboration demands more than good will**
9. **"Tech"ing it to the streets**
10. **A ruler is an important but limited measuring stick**

1. Effective voter contact is up close and personal

A number of empirical studies and analyses prior to the 2004 election cycle, demonstrated that in-person contacts were the most effective motivational message delivery system.[4] This finding drove the direct voter contact approach that prevailed during the 2004 cycle.

Many organizations placed a premium on contact that was delivered by a trusted peer; ideally a person in some sort of extended relationship through an organization or as a neighbor, be it a paid or volunteer canvasser. Thus, in the scaled-up efforts that include outside resources and field staff, many groups felt that a community-based messenger added power and credibility to the messages being communicated.[5]

This proven method of contact is resource intensive and requires significantly expanded organizational capacity. More experienced organizers and skilled supervisors are needed on the ground to manage effective operations and in additional locations. The significant work particularly in communities of color during the election should be expanded into other areas of civic engagement, using permanent staff and volunteers who are familiar with these communities. Moreover, as a community that seeks to empower the underrepresented, we should have a commitment to strategically build leadership that reflects these communities.

2. Build it (strategically) and they will come

A voter engagement strategy that integrates voter registration, voter education, voter protection and get-out-the-vote (GOTV) activities is more likely both to produce increased turnout on Election Day and to yield citizens who stay engaged in civic life beyond the voting booth. While many organizations maintained civic education work in 2004, their priority focus and funding was for voter registration first and turnout second.[6] Many of these efforts did not connect to the ongoing agendas of individual organizations and to the issues that their constituents care about.[7] For the most part, voter protection activities were not incorporated into voter engagement programs in a timely way (see lesson 6).[8]

Building a voter engagement program well requires customizing to geographic, demographic and cultural circumstances.[9] Reaching residents of Indian reservations where there are few street addresses, or working with congregations where door-to-door contact may be difficult, for example, often represent significant challenges.[10] In response, organizations experimented with unconventional methods and approaches. For example, in order to reach young people who are better defined by "how they live" than "where they live,"[11] voter registration drives were conducted at street festivals, bars, coffee shops, bowling alleys, laundromats, and even in taxicabs".[12]

While one approach does not necessarily work for all constituencies, some best practices have emerged.[13] As groups experimented with combinations of paid and volunteer staff operations, many found that volunteer-based programs took significantly longer to build and that volunteer-driven voter registration is less disciplined and presents greater challenges to meeting steady production goals than working with paid canvassers. That said, a number of community-based[14] organizations, particularly groups in battleground states where constituents were saturated with contacts, reported that volunteers succeeded in engaging constituents more effectively than paid canvassers.[15] Some activists argue that the long-term benefit of the volunteer model is its potential to build a committed base of skilled volunteers that will remain active. A number of groups agreed that the most effective model combines the best aspects of paid and volunteer canvassers with paid staff coordinating volunteer canvass teams.

3. Voter engagement is part of a permanent campaign

Voter engagement is an important tool for advancing broader civic engagement. The more voter engagement activities are integrated year-round into ongoing community and issue organizing, the more value can accrue to both. All functions of an organization, such as communications, fundraising and outreach, can be incorporated into a voter engagement plan for maximum impact.

Education about issues can encourage people to vote. Many issue organizations report that they got engaged in voter work because they are tired of losing policy battles. Elected officials are more responsive to constituencies that vote, enabling these constituencies to move public policy and increase accountability on issues. Voters, particularly those from disenfranchised communities, need to see that voting translates into collective power and impact. Relationships established with new and infrequent voters should be nurtured, and follow-up contact should clearly connect voter engagement, policy/issues and community priorities. This should be a seamless flow, minimizing the current boom/bust cycle of elections.

4. Ready, set, plan

Early planning and capacity building will enable organizations to effectively work at the scale necessary during an election year. Ideally, groups will receive funding for strategic plans that incorporate goals and timetables for training, support and execution and enable them to maximize the additional resources that become available during an election year.

Receiving funding later in the cycle or being uncertain as to when funding will arrive made it more difficult for groups to use available resources strategically. Rapid organizational growth also strained systems and caused overlap, ultimately making evaluation more difficult. Late funding limited the groups' ability to train staff and volunteers appropriately and such resources often ended up supporting communications such as billboards or radio ads instead of supporting organizing because of insufficient

time to recruit and train staff and volunteers. Even well funded organizations sometimes hold back resources in fear that funding will not be readily available after the election. This can have a negative impact on the outcome of voter engagement work at the critical final moments before an election.

To be effective, community-based organizations must invest early in volunteer, staff and leadership training and technical assistance, strengthening their operations with electoral tools such as voter databases.[16] Many organizations experienced very steep learning curves, organizer turnover, and little time for training or staff development, in addition to increased and unanticipated management, accounting and technological challenges. Groups felt vulnerable to attack or limited their scope of work due to insufficient knowledge and skills related to legal and communications issues. And quite a few organizations had difficulty finding experienced mid-level leadership to run field programs.

Priority technical assistance and training needs that were identified by groups include strategic communications, technology and database management,[17] and legal training regarding appropriate §501 (c)(3) demographic targeting, messaging and information sharing. Additional training needs include fundraising, the ability to respond rapidly to changing conditions, and leadership development for staff and volunteers. Beyond training needs, voter engagement is a team activity that gets better with practice, therefore local and state elections should be considered capacity-building opportunities.[18] Such trainings and trial runs also constitute vital opportunities to interact and strategize with peer organizations and develop lasting bonds of trust which underpin organizational collaboration (see lesson 8). For foundations that invest in training and ongoing technical assistance, these are gifts that keep on giving.

5. Voter files[19] are the fuel that drives voter contact

Using voter files and enhanced databases[20] can substantially increase the effectiveness of voter engagement work. Data about past levels of turnout, percentages and numbers of minority residents, income levels, information about interest in a variety of issues, and past organizational activity can help groups to focus their §501 (c)(3) registration and mobilization efforts. Most groups now recognize that voter databases are powerful tools for effective voter and other organizational work.

Beyond turning members into voters during an election, databases can help build organizational long-term capacity by turning voters into activists on issues before and after elections. Voter lists enable groups to gather and retain personal information and conduct identification for issue advocacy, have focused communications with specific voters and track these communications. They also enable groups to establish and define quantifiable goals and to track accomplishments over time. Enhancing lists constitutes a particularly worthwhile investment, since it uses §501 (c)(3) capacity-building resources to provide change-of-address and new phone information that allow organizations to keep in touch with the 20% of their membership who might move in any given year, and yields

precious potential donor information. Indeed, several organizations using enhanced lists have created a seamless continuity between nonpartisan GOTV work and donor cultivation using voting history information as an indicator of likely donors to an organization.

Most groups had serious difficulties obtaining and managing data. There is a wide gap in technological knowledge and sophistication among groups, and many groups are novices. An organization's ability to work with voter lists is critical, since lists rapidly go out of date and are of little use unless organizations maintain them. Yet, integrating voter file management into ongoing organizational work has proven to be even more of a challenge for most organizations. The process of accessing local or statewide voter files and using enhanced member lists represents a leap of sophistication for many organizations, thus training is an essential part of the investment.[21] But the importance of training transcends the technical. For managers or key staff, it also familiarizes them with the core demands of their grassroots or statewide stakeholders and allows for fine-tuning of the system, which helps maximize its utility for a diverse range of activities including ongoing priorities such as lobbying and fundraising.

Lists need to be accurate and the flow of data needs to function well. Many groups experienced mechanical difficulties in their attempts to build and maintain an effective database. Many did not have timely access to accurate enhanced data lists, could not regularly match lists to voter files, or had incompatible database structures, which limited the possibility of sharing information among organizations. Resources and time were squandered because multiple organizations purchased the same voter files and sometimes procured inappropriate software. Investment in list enhancement (which includes checking of source data against change-of-address records) and training helps ensure that these two prerequisites for effective voter work are fulfilled on the front end of any large-scale program. It is also important to audit the voter file information that participants will need early in the process, so that it is appropriate and meets the needs of different organizations. Furthermore, efforts are needed to identify the best sources of accurate voter files early in the election season, and to rationalize their purchase and distribution (i.e., facilitating cost sharing, platform compatibility/uniformity and collaboration). Resolving these issues early in the process will enable organizations to use voter files more effectively before, during and after elections.

6. Voter protection must be front loaded

Field leaders paid more attention to voter protection[22] in 2004 than ever before however; the focus of these efforts was on poll watching on Election Day. In order to increase the effectiveness of voter protection efforts, they should be an important element of year-round voter engagement programs. Decisions made and actions taken well before elections and during off-years have a huge impact on whether a person is able to vote on Election Day and whether that vote is counted. Such decisions include the disposition of provisional ballots, governance decisions regarding voting equipment and purge lists, and county budgets that determine the allocation of staff and other resources.

Effective voter registration programs require timely processes to verify that voters made it onto the rolls and to allow for correction of incomplete or inaccurate applications. Where legally permissible, groups should photocopy registration forms as evidence for voter protection purposes such as immediate advocacy and litigation, beyond the need to be accountable to funders. In addition, building voter protection objectives into the design of databases will enable organizations to capture pertinent information and avoid delays in registration processing by simply accessing information in the database and matching it against voter files. Organizations should seek to develop and maintain relationships with officials who manage voter files and make decisions regarding polling stations, hours, language, transportation and disability access[23]. In the election cycle crunch elections staff in some places refused to meet with newcomers and were more likely to alert advocates with whom they had a relationship about potential problems such as funding, staffing and polling place shortages. As a result of trust and good working relationships, some election officials permitted volunteers to help contact applicants with incomplete applications, allowed voters to provide missing information until the evening of Election Day, and helped local election workers advocate for more funding from city officials.

Despite significant progress, 36% of those eligible to vote still did not do so in November 2004. Citizens from groups that are underrepresented are disproportionately subjected to barriers to voting, bureaucratic inattention, understaffing and inadequate redress of voter suppression and disenfranchisement. Many underrepresented constituencies are still underrepresented at best, and marginalized or disenfranchised at worst, and too many communities are written off because of their low voter performance.

7.   Repeat the message, then repeat the message

Very little work has measured the impact of §501 (c)(3) messages.[24] There is general consensus in the field and among pollsters that messages should be developed for particular groups of people based on issues about which they care.[25] A major effort targeting young voters conducted focus groups with young people who were not in college and who were described as responsible yet "on the verge" of engagement because they were cynical about the benefits of voting and/or government. The message that was consequently developed to reach this group was "Make them pay attention to us", emphasizing to young people that the issues they care about were overlooked because not enough of them voted.[26]

Efforts aimed at unmarried women used pre-tested messages[27] focused largely on empowerment. The primary messages were: 1) 22 million women didn't vote in 2000; if we all get together and vote in 2004, we can be agents of change; 2) messages that enhanced the connection with economic security concerns such as health care, pay equity and retirement security; and 3) messages that countered the perception that the logistics of registering and voting are difficult. A number of organizations that targeted this constituency group found that this background research was helpful and stuck to one or

more of the tested messages, or found information regarding what messaging to avoid, was also valuable.[28]

A series of post-election polls[29] show that while no one group of voters seemed particularly motivated by ballot initiatives, a significant number of voters indicated that ballot measures were key motivators in getting them to the polls.[30] Polls also indicated that the substance of an initiative had a significant impact on the motivation to vote, and that voters were more likely to be motivated by being in favor of an initiative rather than against it. [31]

Message repetition and combination of messages have been found to have a meaningful impact.[32] A delivery system that reinforces a message through multiple media, known as convergence[33], was found to increase impact in a few experiments, the strategy being that it links and leverages communications assets so that the whole is greater than the sum of the parts.[34]

8.   **Collaboration demands more than good will**

Unprecedented coordination, collaboration, networking, and mentoring took place during the 2004 election cycle. At the national level, groups networked through efforts such as the Campaign for Communities and National Voice, which created the "November 2 GOTV Campaign". To varying extents, this cooperation facilitated sharing lessons, coordinated voter protection work, common access to voter files, coordinated training and even fundraising, and dividing up turf for voter mobilization. Some groups noted that increased coordination among funders helped the groups work more collaboratively.

In some states, collaborative "tables" enabled organizations to complement one another's functional strengths and compensated for their weaknesses, for example, by using one organization's access to public spaces for site-based work, another organization's staff or volunteer base to run events, and yet another organization's physical infrastructure. In some states, ballot initiatives provided a venue for groups to work together on a common issue, target specific communities, and share resources.

The structures, requirements and functions of tables were not developed early in the election cycle. In retrospect, some of the larger organizations believe it is important to have a common scale among the organizations that make up a collaborative. Some groups lacked the organizational strength for their participation to enhance a coordinated effort, yet felt that coordinating tables should also function to grow organizations and increase their effectiveness.

Less formal collaborations between national organizations and non-affiliated community-based organizations were viewed as effective in instances where national groups were sensitized to the culture of local community-based groups, hired local staff, were embedded into local groups, or otherwise made efforts to integrate into the community. Where national-local coordination was weak or nonexistent, opportunities were

squandered, such as when voter lists developed by national groups were not captured for continuing use in local organizing.

Trust, resources/services offered by the table, and money are the three important elements that kept organizations participating in tables. Among the primary factors correlating with a lack of cooperation were lack of incentive or expectation that groups participate in formal coordination efforts, and lack of staffing to work out beneficial terms. Not all groups need to work with all other groups, but it is easier to support those who find it in their common interest to coordinate.[35] At its best, collaboration can facilitate sharing of information, best practices, resources (precinct maps, voter files) and identify common functions (technical and legal assistance, training, voter protection, turf agreements, funding, research and materials). However, such civic engagement collaborations require appropriate support infrastructure, staffing, relationship building, and clarity of goals.

9.   "Tech"ing it to the streets

New, largely Web-based technologies were used and experimented with during the election cycle. The broad functional categories of Internet-based technology used during the 2004 election cycle are: collaboration; communication; content/news creation; fundraising; and organizing or collective action.

Particularly visible were registration efforts where citizens either registered online (in states where this was permissible) or downloaded voter registration forms to print, complete and submit by post. Some of these programs provided on-line registration incentives such as music downloads. Filling out registration forms online has the built-in advantage of instantly creating a new voter database. However, it is not clear whether people who fill out voter registration forms on line would have registered by other means.

Given the lack of targeting employed in most of these campaigns, the impact of "email fatigue," and the positive results seen through personal contact, it would seem that new technologies are most effective when they enhance a field operation and are integrated into an ongoing organizing strategy. Examples of this on-land and on-line nexus include: on-line registration with phone follow-up; shared, web-accessible databases for more efficient management of campaign operations; on-line recruitment of field volunteers; virtual phone banks and web-based predictive dialers[36]; and web sites that let citizens verify and update publicly available information then used to streamline provision of assistance and information via telephone hotlines. For example, citizen corrections and updates to mypollingplace.com helped improve polling place location information provided via election protection hotlines. [37]

Some groups took feedback and comments given to canvassers and wove them back into Web sites and even onto Palm Pilots (PDA's). Some organizations also made use of PDA's with message videos, bar coding and other new technologies in their fieldwork to enhance their ability to effectively target a constituent group and deepen relationships, as well as to track quantitative results.[38] These technologies hold great promise. With open

source[39] software, smaller groups of programmers can create powerful tools without the overhead and profit imperatives of corporations. These tools can also be scaled and easily customized. Feedback loops unique to online tools allow users to improve technology even as it is deployed. Online tools allow decentralization of work tasks, which can be distributed among geographically dispersed groups and volunteers.

In addition to training and technical assistance, a culture change is needed to take advantage of the technological possibilities. For example, taking advantage of open source software requires a greater sharing of tools and information, and an emphasis on decentralized decision making and cross-organizational efforts and campaigns.[40] Young people are most comfortable with new technologies and the associated networking culture, making them prime targets for organizations to experiment with reaching constituents in these new ways. On-line and digital tools also hold promise for engaging marginalized communities and leveling the playing field for nontraditional candidates, but achieving this aim requires developing technologies that meet the needs, economy and culture of marginalized communities. Given that Generation Y[41] will turn the US into a majority non-white society by 2050 and the Millennials are the first generation to surpass the Baby Boom in number, the ease of individualizing messages to different constituencies and in different languages via the Internet increases the value of these tools for reaching historically underrepresented groups coming into their own in the next couple of generations.

10.   A ruler is an important but limited measuring stick

Despite some difficulties, the 2004 election cycle had greater voter registration accountability than any previous one. Enhanced voter verification also produced a greater likelihood for names to reach the rolls.[42] A group of leading national organizations also developed accountability measures for their mobilization work.[43] Performance benchmarks enable large groups to document their work and small groups to establish themselves as viable operations. Accountability by goals and timetables also allows groups to measure their progress and move quickly to secure training or support when they are not meeting goals. And because elections are about measuring, it makes sense that election year voter engagement work uses primarily quantifiable measures.

Nonetheless, not every element related to building an organization's capacity for civic engagement objectives can be quantified. Indeed, in a few instances numerically-based support had a negative impact on an organization's long-term effectiveness vis-à-vis its constituency base, as in cases where the need to register large numbers in a compressed period shifted operations from an organization's ongoing priorities. Significant organizational achievements are reflected in leadership development, board commitment, staff retention, reputation of a community organization, visibility in the media and among policy-makers, and attainment of policy outcomes. Additionally, accountability and evaluation must reflect programmatic variation for distinct cultural and geographic circumstances, as discussed in lesson 2. An additional set of rigorous metrics is needed to assess these. Organizations need to be clear about their goals, and then must ensure

appropriate planning, staffing and funding in order to achieve these. Metrics should also value performance over a period of time extending beyond an election cycle because, as noted above, relationship building, along with other important infrastructure for making voter engagement gains is developed at other stages of the civic engagement process.

_____

Notes on process:

This document highlights recommendations that were culled from a number of sources, reflecting a diverse array of field organizations. These included some national groups, some of their local affiliates, issue/community-based organizations – both experienced as well as those that undertook this work for the first time and groups that are often outside of these collaborative conversations (e.g., faith-based and service-provider organizations).

The information was gathered from the following sources:
1. Independent assessments that were conducted as part of the Voter Engagement Evaluation Project (VEEP) planning process (reports contained in the VEEP pre-convening materials authored by Teresa Purcell, Chuck Shuford and Marc Caplan, Kafi Blumenfield, Carin Schiewe, Deena Fidas and Stephanie Firestone. Please consult individual reports for a description of their respective methodologies.
2. Analyses from group discussions conducted by Teresa Purcell with 19 field organizations as well as group discussions with numerous low-income organizations, which were conducted as part of the Center for Community Change's Community Voting Project evaluation
3. Summary reports extracted from organizational self-reports and follow-up interviews by Carin Schiewe
4. Thoughtful input from prominent field leaders – additional insights and feedback to an initial draft of this document were solicited by Stephanie Firestone and Heather Booth
5. Additional resources such as the review of new technology by Allison Fine, provided in the VEEP pre-convening materials

In addition to these aggregate lessons, empirically derived findings are provided where available. Little hard data exists to substantiate what worked and what did not. As of June 2005, voter files from counties and states are still becoming available and have not yet been independently matched against registration and GOTV targets to determine whether individual registrations were valid and made it onto the voter rolls, and whether an individual that was touched by an organization for mobilization actually voted.[44]

Furthermore, empirical findings regarding strategies and tactics that work better than others in particular circumstances can be derived only through controlled experiments. Experiments in 2004 embellish the prior field of work collected by Yale professors Don Green and Alan Gerber[45], who spearheaded the study of voting by promoting the use of

randomized field experiments primarily in voter mobilization drives; there has been even less testing of voter registration drives. During the 2004 election cycle, a group of funders[46] launched a series of empirical studies representing the largest set of studies of this kind ever conducted in one federal election cycle; the summary findings that are available at this juncture are included in the VEEP binder. In the past, GOTV studies (mostly aimed at *young* voters) have generally found that the same mobilization strategies are effective regardless of the populations targeted, but that finding bears continued testing with new combinations of target populations and GOTV methods. Only when all the experimental results from 2004 are available will we be able to draw conclusions about differential impacts on various populations. According to Peter Levine, CIRCLE Deputy Director: "It is noteworthy that turnout was so high in the 2004 elections that some GOTV efforts may have failed because too many people intended to vote already (a 'ceiling effect')."

There are many combinations of medium, technique, timing, message and target population that remain to be tested, and one of the objectives of some of the VEEP assessments is to identify critical areas for additional research. Discussion at the VEEP convening will touch on these needs, and once the full set of results from the 2004 experiments are available, these will also inform decisions regarding the most important questions to pursue in coming years. As Peter Levine notes: "A question is important if it would improve the practice of practitioners in the real world." Ultimately, evidence that particular practices are effective is a driving force for effective grant making, thus the funder community and the field may have a greater interest in collaborating in order to effectively advance these valuable tests.[47]

We would like to thank the following national field leaders and others who provided feedback and helpful insights in the preparation of this document:

Deepak Bhargava, Center for Community Change
Jeff Blum, USAction
Becky Bond, Working Assets
Seth Borgos, Center for Community Change
Judith Browne, Advancement Project
Alan Charney, USAction
Ivan Frishberg, formerly with the New Voter Project
Don Green, Yale University
Hans Johnson, Democracy Project
Greg Moore, NAACP National Voter Fund
Zach Polett, Project Vote
Jonathan Scott, Clean Water Fund
Gary Steinberg, Clean Water Fund
Wendy Wendlandt, New Voter Project

---

[1] See enclosed memo citing turnout from 2000 to 2004, as per 2005 U.S. Census Bureau data.

[2] These lessons reflect areas of relative consensus that emerged from numerous independent assessments, analyses from group discussions, and thoughtful input from field leaders (please see process note at the end of this document).

[3] Lessons are provided in sequential order for clarity.

[4] For example: "Each successful contact with a registered citizen raises that individual's probability of voting by approximately 7 percentage points…" (Gerber and Green, 2003).

[5] In this respect, it is important to distinguish between outside and community-based volunteers.

[6] This is reflected in the level and timing of grant making for different voter engagement activities (see funding survey report) and in organizational planning, staffing, etc.

[7] This reflects many organizations' lack of understanding regarding how they can legally raise issues in a c-3 context during an election cycle, organizations not building into their plans educational activities such as candidate forums, as well as the lower priority placed on funding these activities.

[8] Also see enclosed funding survey report for a breakdown on percentage and timing of support for various voter engagement activities.

[9] Organizations employed strategies and voter contact programs that maximize geographically-based opportunities provided by state laws and regulations governing the voting process, e.g., mail in voter registration, same day registration, early voting, absentee voting.

[10] The high number of ineligible voters in some target areas, language barriers, and the transient nature of target constituencies or those who keep unconventional hours, posed significant challenges for many groups.

[11] i.e., land line telephones are no longer effective ways of reaching this and some additional constituency groups that are highly mobile.

[12] A test conducted in a local election in May 2005 also found a positive GOTV effect from an intervention that focuses on place rather than a list of individuals, e.g., town "festival" to promote voting.

[13] Additional best practices include: Some empirical studies support the multiplier effect that voter operations have. Studies show that voting is habit-forming, thus participating more regularly in elections reinforces the constituent's habit of voting. Many field organizations also reported that engaging voters at a deeper level, i.e., as election workers (canvasser, poll-worker, volunteer) on Election Day, was shown to be a successful recipe for ongoing commitment; some noted it as a life-altering experience. Beyond work with field organizations, opportunities for engaging young people and setting them on the path of a lifetime of voting (and voter advocacy) include student grants for Election Day work and other funding support provided under the Help America Vote Act and other incentives (e.g., obtaining community service credits). Further empirical studies show that engaging one person makes it more likely that his/her friends become engaged.

[14] For the purpose of this document, community-based organizations refer to groups that are rooted in a community, regardless of whether they are large or small, single/multi-state operations, issue-focused, etc.

[15] Though some community based organizations indicated that the competition for volunteers with national organizations that were recruiting the same volunteers and paying them to do registration work, put the local organizations at a significant disadvantage and caused significant hardship since they could not compete financially.

[16] Groups newer to electoral organizing acknowledged the difference between the organizing skills required to do political organizing as distinct from the community organizing skills they had on staff (see glossary for definitions). One organization successfully hired political professionals that they embedded into the community to drive the work. Access to training and political professionals was mentioned as a tool that could make a significant difference for the community organizations beginning to do this work.

[17] See description under voter files.

[18] Funding cycles that support voter engagement work beyond a national cycle (i.e., through a subsequent local election cycle) provide opportunities for an organization to marry on-year and off-year work and transition more smoothly. The Liberty Vote! Project experimented with national-local election funding cycles during 2004-05 and will produce a final evaluation in the summer of 2005.

[19] A voter file is a database file that is updated by the state or county elections division in each state and includes information such as the history of the voter's participation in prior elections.

[20] Enhanced databases are list that have been enhanced with various pieces of data; including age, jurisdictional information, groups membership, age, party, etc.

[21] A regular program of grassroots training gathers participating leaders and explains the benefits and uses of the voter file and enhanced lists. It also provides participants hands-on familiarity with accessing and manipulating their own organizational data or the records of voters in their area. Ideally, training also facilitates direct contact exercises that use the furnished data, either through predictive dialing phone calls or doorstep canvassing, or both.

[22] Voter Protection refers to all (pre-and post-Election Day) activities that ensure a voter's equal access to the vote and that his/her vote is counted (e.g. removing structural barriers to registration and voting and litigating where necessary, advocating for improved election administration practices, educating voters and fighting unintentional and intentional intimidation/suppression).

[23] Efficiencies can be obtained in many places through collaboration via state coordinating tables.

[24] Citations to empirically derived findings related to message are made throughout this text.

[25] Though there is no empirical evidence that messages must be tailored to a particular group in order to be effective

[26] This message developed for the New Voter Project, countered cynicism by not having to promise *results* if people voted.

[27] Women's Voices. Women Vote spearheaded this work, with Celinda Lake and Stan and Anna Greenberg doing background research on likes and dislikes and testing messaging approaches.

[28] We chose to highlight these two national constituency groups' use of message because they both based their outreach on reasonably uniform and pre-tested c-3 messages, and because they attained the most significant increases in turnout from 2000 to 2004. Additional polling studies regarding this linkage are available from NVP and WVWV.

[29] Ballot Initiate Strategy Center (BISC); polls conducted by Lake, Snell, Perry & Associates.

[30] Yet there is no empirical testing ensuring that this success reflects the message itself and may not instead be attributed to other factors.

[31] One empirical study undertaken in 2004 indicated that negative and positive mobilization messages do not produce dramatically different results. An additional study among Asian-American communities showed the direct effects of message types on voting to be generally weak. (See CIRCLE report in VEEP binder.)

[32] These findings assert that medium matters more than message (CIRCLE report)

[33] A communication strategy whereby people receive a steady, converged stream of mutually-reinforcing messages from a wide spectrum of selected communication sources, and each successive communication is timed to build on what came before.

[34] MacWilliams, Robinson & Partners

[35] Coordination, collaboration, networking, and mentoring were valued by the field, both for yielding significant benefits on function and efficiencies, and in order to develop greater cross-cultural understanding.

[36] Predictive dialers are the computers that telemarketers use to make the phone calls, and screens out busy signals, not homes, disconnects and 75% of answering machines. This allows volunteers to spend their time talking to voters instead of dialing the phone and not reaching anybody. Web-based dialers allow you to connect to a predictive dialer through the web, using a computer and a telephone.

[37] Election Protection refers to a program that monitors elections (Election Day, primaries and early voting) through polling place monitors and a national hotline that provides voters and others with immediate access to information, and where necessary to lawyers, to enforce their rights.

[38] We have not yet seen evidence of the effectiveness of PDA's.

[39] Open source development is the development of software where the programming code is open to allow many people around the world to develop the product simultaneously and inexpensively.

[40] It is worth noting that some of the most successful Web-based tools were created and embraced by entrepreneurial campaigns operating outside of the traditional 501C3 civic engagement organizations. As a result, many of the volunteers, donations, and voter contacts generated by this new technology were deployed without careful coordination with existing field plans.

[41] Born during a baby bulge that demographers locate between 1979 and 1994, they are as young as five and as old as 20, with the largest slice still a decade away from adolescence. And at 60 million strong, more than three times the size of Generation X, they're the biggest thing to hit the American scene since the 72 million baby boomers.

[42] One suggestion made for revising the numeric measure the effectiveness of registration is to make organizations accountable for the number of voters that make it to the rolls rather than the number of registration cards submitted (such a system would require effective and timely database feedback to organizations as described in the voter protection lesson).

[43] National Voice convened the national "November 2 GOTV Campaign"; final results are due shortly, and the consultants that led this effort (Gail Stoltz and René Redwood) will provide initial findings during the VEEP convening.

[44] The aforementioned work by Polimetrix will derive this information.

[45] In the book: "Get Out the Vote! How to Increase Voter Turnout", by Donald P. Green and Alan S. Gerber, 2004.

[46] The Carnegie Corporation of New York, the JEHT Foundation, The Pew Charitable Trusts, the Proteus Fund and the Solidago Foundation.

[47] Traditionally, field organizations have had limited receptivity to conducting these tests because they are hesitant to 'control' portions of their target universe. Moreover, sporadic experiences with funder interference, i.e., compromising the scientific method in order to advance numeric mobilization objectives, have limited the results of some tests (see CIRCLE report). The experience in 2004 and increasing collaboration between funders and field to advance effective evaluation matrix, may open the door for a greater focus on field tests moving forward.