

The Evolution of Data Driven Politics

Political campaigns in the 21st century use computer generated databases for all forms of voter contact. Whether calling voters by telephone, sending them direct mail or walking door-to-door, it is virtually unheard of not to do so without a computerized voter file. Whether their goals are fundraising, voter persuasion, attendance at rallies or get-out-the-vote, these tasks are made far easier and more efficient by having this capability. The existence of a voter file is almost an assumption in modern campaigns and the competition among vendors isn't between those who have them and those who don't but in the amount of data appended and the flexibility that will be made available for accessing that data. It is far more a quality over quantity assessment and the voter file usage has grown exponentially.

But this has not been the case for very many years.

I write this from a unique vantage point, having been at the forefront of the development of these modern tools. Communicating with voters has always been the task of a campaign but being able to harness computer techniques to process data faster and more efficiently than ever before has created a business that didn't exist when I first ventured into politics. It's almost amusing to look back over these years and realize we were inventing new ways to accomplish ancient political tasks – and a new business as a result. This new style of campaigning began by recognizing the growing capabilities of computer technology, marrying those processes with the traditional demands of political campaigns. We would find that Democratic State Parties would become the sensible vehicles for bringing these new techniques to the attention of campaigners. We adjusted our roles to adapt to the swiftly changing technological capabilities available to us. As a result, I found myself in the forefront of this new business that has now become institutionalized, bringing computerized voter files into modern campaigns everywhere. And now, I am involved in maintaining a national voter file database overlaid with predictive models that are once again changing the campaign horizon and creating fabulous advantages to political practitioners.

I arrived in Washington, DC in the fall of 1967, a freshman at George Washington University aspiring to a future in politics. My first day in Washington after my parents dropped me off saw my first trip to the US Senate, hoping to meet my state's Senator, Birch Bayh of Indiana. After all these years it feels fortuitous that I was able to meet him on that first day, to volunteer my services and to change my life.

I was soon offered a volunteer job on Saturdays and ended up entering, by hand, vote totals onto computer forms so the 1968 re-election campaign could institute its first ever computer targeting effort. Within the next few months, I was showing up more often in the office, taking on more tasks, usually those things other staffers didn't want to do. Eventually I

made myself valuable enough to the necessary number of staffers that I was offered a part-time paying job, splitting the Senate's lowest salary rate with two other fellow volunteers.

Over the next months, I maneuvered my way deeper into office life and was offered a job in which I didn't have to share a salary. It was working for the office manager, both in the mail room as well as stuffing envelopes and running errands. While running those errands around the Capitol I came to learn how the Senate worked, how constituent services were handled, how mass mailings were produced and, most importantly, the services the Senate made available to Senate offices. One of those was computer services. I learned, while barely 19 years old, that Senators were allowed to accumulate mailing lists for franked mail but our office only had a list of 13,000 people and mailed to it only once a year.

Over the ensuing 13 years, serving in a variety of jobs with increasing importance, including traveling with the Senator for 5 months during the successful re-election campaign in 1974, one mission was constant. That was to build a larger mailing list for a more aggressive franked mail program so we could have some possibility of generating news about Sen. Bayh without depending on the Republican-leaning news media in Indiana. When we left office in 1981, we had 2.8 million names with over 250 identification codes on our mailing list and had been the Senate's largest mailer for 3 years running.

That meant, with this experience, I gained valuable knowledge about databases, computer services and what worked or did not work in the world of computer-generated direct mail.

We lost our 1980 re-election campaign in the Reagan landslide and I found myself looking for work. After spending a year running an organization trying to fight the negative campaign tactics of the New Right, raising money with direct mail throughout that year, I was offered a job by a small company tasked with acquiring voter files for the AFL-CIO in order for them to perform matches and find out which members were registered to vote. We would be free to sell those voter files, computerized lists of registered voters, to campaigns. I knew nothing about the existence of voter files in the country, only that Indiana did not have voter lists computerized, a painful lesson I came to know while overseeing our campaign's voter contact program.

While there was nowhere to go to learn about voter files or how to acquire them or how to process them on a computer to make them usable, there was also no one to tell me what I couldn't do.

As a result of these efforts, I made more money in 1982 than expected and left the company to go on my own, changing directions shortly thereafter to join Below, Tobe & Associates, a Los Angeles firm that produced computer-generated mail for Democrats in southern California. They had just signed a contract with the Democratic National Committee (DNC) to acquire voter lists for the DNC's direct mail fundraising and needed to start a Washington office largely to assist in this effort. That's when I really got going in this area.

In 1984, I sold my first statewide voter file project to a client, meaning we were to build a voter file from scratch, often keypunching paper lists to get them in computer form. The candidate was Congressman Al Gore, running for the US Senate in Tennessee. When the list was built, we soon convinced the Democratic State Party to take over ownership of the database. This made sense for three reasons.

One, it put the state party back in political campaigns, providing a service to candidates. Two, it provided access to candidates of high quality data either for the first time or better than they might otherwise have. Three, it allowed a vendor like us to reach campaigns we would never reach. This made an enormous amount of sense to me.

Also in 1984, I persuaded the Indiana Democratic Party to build a voter file for the same reasons, becoming our second State Party Voter File Project. By 1986, the number of state parties hiring us for this task grew to six, a number that doubled two years later. Soon, the DNC began funding these projects and an increasing number of state parties had their own voter files, extending data and computer services to a growing number of campaigns. The logic of this approach and the benefit to state parties became clear to those of us in the business as well as an increasing number of political operatives.

By 1990, state party work had become the centerpiece of our business. Because of it, we were far more engaged with the Dukakis campaign in 1988 than we otherwise would have been. More and more states were developing voter file projects and our competitors began taking on these projects as well. By the end of 1990, I decided to leave Below, Tobe and start my own company, Blaemire Communications. Having become somewhat of a voter file expert, working with state parties on my terms led me to venture out on my own.

In a very short period of time, I was accumulating state party contracts and my company became largely focused on building their voter files and providing computer-generated products for campaigns throughout those states. Those products included mailing labels, phone lists, walk lists, file matches, poll samples and laser-generated direct mail. Not only were those of us in the business concentrating on state parties but the role of state parties within the Democratic community was expanding as a result. Political operatives were coming to expect a high quality voter file at the outset of their campaigns and the number of mail and phone vendors generating business because of the growth of computerized voter contact was increasing as well. Computerized voter contact using voter files had become completely institutionalized in the Democratic political community.

During the period of 1991-1992, we had an aggressive Democratic Presidential nominating process, one in which every candidate made sure quality, computerized voter files were available in early primary states for their direct voter contact efforts. This was not only good for my business but recognition that this aspect of campaigning had really become accepted. I continued to add Democratic state parties to my company's portfolio and, when

President Clinton was looking toward re-election in 1996, he had a whole new crew at the DNC who were focused on this aspect of the coming campaign.

We may not remember that the Clinton re-election was not considered a sure thing in 1995. The DNC wanted to be sure that all state parties had quality voter files available for the President's re-election. My company became one of two with whom the DNC contracted to build voter files for states where projects like this did not exist. By the beginning of 1996, virtually all state parties had a voter file they owned, managed by a reputable vendor.

Soon after 1996, my company experienced what I have come to know as one of the three major developments in this business that substantially changed our entire landscape. It had become possible to downsize the computer services business away from the mainframe to a less expensive PC-based network. This development not only lowered my costs but also allowed me to move out of the mainframe facility I was in and into our own offices where we could manage our own network. While my overhead went up considerably, my job costs virtually disappeared.

We moved into our own facility in 1997 and produced all of our own work in-house. I increasingly traveled to meetings of Democratic state chairs as the vendor who represented more of them than any other, often returning with new client prospects. Our state party work meant an even greater role in providing data during the Gore Presidential campaign with many of the orders placed by DNC staff for data and products in the states for which we were managing voter file projects. Ninety-percent of our products were printed materials: lists, labels and laser-generated mail. Then came the second of those three major developments – the internet.

In the early part of this century, sending data via email became the rule, where it had been the exception. Orders had always been placed by telephone or fax and now they were usually placed by email. And my job costs went down as printed lists and labels became almost completely replaced by emailed phone files or mail files.

Now I was into my second decade in the business, a decade spent compiling data from many and varied sources, receiving it on paper to be keypunched as well as 9-track tapes, 8-track cartridges or diskettes, either 8", 5-1/4" or 3-1/2". Soon, diskettes would be replaced by CDs or data would be received via FTP or online download processes. Another effect of the Gore campaign had a much different impact on this business.

Because of the long recount in Florida and the revelations about "butterfly ballots" and the inconsistent methods of voting within Florida, Congress passed the "Help America Vote" Act. Designed to standardize the voting process across the country, at least in federal elections, it also resulted in states creating statewide voter files. Instead of acquiring voter files county by county in order to compile a statewide file, single databases were now becoming available through the Secretaries of State. No more would we have to build a file like Maine, compiled from 517 town files.

So the business was getting easier, less expensive and everything could move faster. While Fedex had seemed like a miracle with overnight deliveries, it soon would seem prehistoric, as data pulled for list production could be delivered only minutes after the client request.

My role had been pretty well defined by the political community. We were the experts who knew how to manipulate the data in order to get our campaigners the data they wanted. Even if they asked for something they really didn't want, we were in a position to keep them from making costly mistakes, to make sure they got what they really wanted for voter contact. We stood between the customer and the computer to make sure the process was done right. I can't count the times a campaign in a Democratic primary would ask for a mail file of frequent primary voters, neglecting to include in that request a requirement that those primary voters be Democrats. Knowing the data better than the client put us in a position to help them use that knowledge to target accurately and effectively.

But this gatekeeper role, too, would change. The widespread adoption of the internet led to the creation of online tools that would extend to individual campaigners the ability to do for themselves what we were doing for them. I first heard about Voter Activation Network (VAN) in 2002 and soon became convinced that we had to develop our own online system or we would be left behind. Soon, the competition for the online business also stiffened, with the appearance of other online vendors. Blaemire Communications released its version of an online voter file interface, known as *Leverage*, in the fall of 2003. *Leverage* placed the processes we would normally employ on behalf of the client in the client's hands. Now, selecting voters and producing data for voter contact were decisions totally governed by the user, no longer by the vendor. The business was beginning to look nothing like it had. Happily, our system soon became the second most popular among state parties. In 2004 our company managed more voter file projects than any other vendor and only VAN had more state parties online. Many of our state party clients had us build and manage their voter files but hosted them online on the VAN. During the 2004 campaign, our client base was augmented by the DNC having us build a number of other states to put onto *Leverage* so the Kerry campaign would have online access. By the end of the election, we had over 1,100 users on *Leverage*.

Also during 2004 there was a new organization, organized to try and help a Democrat be elected President. This was Americans Coming Together, known as ACT, a coalition of progressive organizations that got involved in all manner of election-oriented projects in several states. It was organized by Harold Ickes, formerly deputy chief of staff for President Clinton, Ellen Malcolm from Emily's List, Steve Rosenthal of the AFL-CIO, Andy Stern from SEIU, Carl Pope of the Sierra Club, and others. ACT became a good client for me in the end but had a larger impact on my life than it first appeared it would.

Early in the cycle I was called by Mark Sullivan, the head of VAN, inviting me to join him at the ACT headquarters for a meeting. Mark felt that if ACT did much of what they were

planning, VAN could not handle all of it and would feel better if he were allied with our company. After the meeting, I followed-up with the requested proposal for building a national voter file separate from state party ownership or involvement. Once that was submitted, I was no longer in touch with ACT. For reasons that did not become apparent until later, none of my phone calls or emails was returned and I turned to more pressing business. While the silence was only caused by the unresponsiveness of one staff person, it convinced me that my services were not needed. Later, I learned that the person I referred to should not have been the one responsible for voter file planning and that my interests fell into a black hole only because ACT was a fledgling organization just getting started.

As ACT got going and I began fulfilling requests from various ACT staffers and field operatives, they reorganized in mid-2004 and I was asked once again to meet with them. At that meeting it was made clear the new people in charge had no idea I had submitted a proposal and agonized over the copy I brought with me, saying their lives would have been so much easier had we won the contract. No one was building and managing their voter files who knew what they were doing. This reinvention of the wheel was painful to them, as one might expect. I was encouraged once again but, as before, nothing happened with it and we turned to normal business, now getting busier with the coming presidential election. Soon, the DNC hired us to host a number of states on *Leverage* and life got about as busy at our office as it ever had before.

Around Labor Day, Sullivan called again to request I join him at another ACT meeting to help them fix severe issues that had developed in their overall voter file and voter contact projects. This ended up being handled in a conference call.

On this call, now with another new set of ACT staff, we were asked to take over the entire ACT voter file operation. The issues were not VAN issues, users throughout the ACT universe seemed happy with VAN. But data issues seemed persistent. Updates weren't happening. State files had gaps in them. Matches weren't being performed as expected. They had no one to handle the inevitable data questions that had long been part of my life. But there was no way we could do that at that late date. We were simply too committed with our existing clients to take on one that would not only be our biggest but in a period when it would be too late to staff up in order to handle it. This was surely the biggest piece of business I had ever turned down but really had no choice. I felt that a juggler might be able to juggle 10 balls in the air at once but if you threw in the 11th, they might all hit the ground. That could very well happen to us.

We all know now that John Kerry was not elected President. I think it is a fair assessment to conclude that the ACT project overreached and failed to accomplish much of what it set out to do. As a result, Harold Ickes brought together his partners in the ACT venture to figure out where they should go from there. The conclusion: solve the database piece. The progressive community involved with ACT felt that there needed to be a national voter file available to all of the organizations they could count on, one of high quality with substantial

enhancements, consistently kept up-to-date. Many of the 501c3 tax-exempt organizations determined they could not use data owned by political parties, something I had learned from them during the year. Therefore, my company could not solve their data needs using voter files that we managed for state parties. The result of all of this was the creation, by Harold, Laura Quinn, Al Dwoskin and others of an LLC called Data Warehouse. Laura had been the CTO at the DNC while Al, a successful businessman, was also a key player in DNC and ACT fundraising. Later, the name would be changed to Catalist.

Throughout 2005 and into 2006, I continued working at Blaemire Communications with state parties and large progressive organizations. In 2004 our biggest client had been the DNC, soon was replaced by the National Education Association (NEA). Our portfolio of state parties covered 26 states, nine of whom were on *Leverage*. Other clients included the Sierra Club, NARAL, Planned Parenthood, League of Conservation voters plus a large number of Democratic pollsters and consultants. As good as things were, I had a growing concern about Catalist. The existence of a national competitor with capital raised by investors, not from revenue it had to generate, made me uneasy. While uneasy, I also had a number of friends who had gone to work there, mostly from the DNC, which had been so good to me.

As a result of those friendships and because I never viewed competitors as enemies, I cooperated with Catalist at times where they asked me to help them with data, handling certain projects for them. Eventually, after having conversations with Catalist staff about forming a closer alliance between the two of our firms, we were put on a monthly retainer to help answer voter file questions and to generally assist them in getting their business into shape. Many people may have felt I was cutting my own throat but I felt it was sensible to work together with them rather than to stiffen the competition and eventually have my head bashed in. Direct competition simply did not make sense.

After the very successful Democratic election in 2006, the landscape changed again in a very major way. Gov. Howard Dean had been elected DNC chair and, after the 2006 election, changed the course of the DNC and, as a result, my business. At the post-election meeting of the Democratic Party in Jackson Hole, Dean announced that the DNC would provide voter files online to state parties for free. All data was to be compiled by DNC staff in-house and all state parties would be provided with VANs populated with the DNC voter files. The impact was something I immediately comprehended. Knowing the nature of the DNC technical staff and the relationship they had with VAN, I knew this would mean there would be no future state party business for Blaemire Communications. This was true for all other voter file vendors as well. And as much as the new policy was resisted by some of my clients, Dean stuck to his guns and forced the states to comply. No one in my business was asked for a minute of their time nor paid a dime to help the DNC do the project right. We were totally cut out.

This made 2007 a very tough year. Watching my clients disappear – free is very persuasive – I had to re-think the entire business. Similarly, many of the large organizations we

depended on were gravitating to Catalist. Either they needed a national database--which we didn't have--or their officers were a part of Catalist--or both. Throughout this period, I continued doing work with Catalist and was being given an increasing number of friendly signs. I have likened the period to the DNC saying, "go away kid, don't bother me" while Catalist was saying, "why don't you come and join us?" Not an easy decision, however. I had loyal employees I needed to worry about. But I also was growing weary. The year was difficult, like nothing I had ever gone through and there were lots of aspects of running a business that I would not miss. So Laura Quinn, Catalist CEO, and I began a lengthy series of discussions that would eventually lead to merging my business with Catalist.

The possibility of changing this part of my life led to a great deal of reflection on the business. When I began, the business really didn't exist. In talks with individuals or groups, I always had to define what a voter file was and how we went about compiling one. Few campaigns had any understanding of how to use computers for real individual level targeting and voter contact. But now the world had changed. Not only did all campaigns understand and require a voter contact campaign, usually with a voter file, but the internet had so democratized the business and wildly expanded the number of people processing voter data on personal computers, that many people began to see the role I played almost as if I were a dinosaur. Maybe it was time for a change.

The Catalist model is a unique one and something that made me feel comfortable quite quickly. I always built databases for clients paying me to do so. Building voter files is a costly process and, since I had never raised capital in any way, I could only build most state voter files when a client was paying for them. Catalist was building a national database to help progressives and Democrats, much of it paid for by investors, made available to organizations and campaigns through flat rate subscriber fees. In other words, the more people bought from me in the past, the more they paid. Now, progressive and Democratic organizations and campaigns could pay flat costs for data everywhere in the country, removing the financial disincentive to using as much data as they might really need. Also, by providing that access online with agreements from subscribers that would have their contact data plowed back into the online database, Catalist had a consistently growing database that provided a unique opportunity to go beyond what I was able to provide with Blaemire Communications by creating synthetics from the data. Whether these are called synthetics, or models, or micro-targeting doesn't matter. The database could now be overlaid with this artificial intelligence, these predictive models, in a way that no one of the old guard voter file vendors could compete with. Being at Catalist increasingly made sense to me.

The predictive modeling is what I would refer to as the third major development in this business. It is the ability to process a massive amount of information in a way that allows us to effectively predict behavior in many aspects of politics. No longer is it possible to be satisfied with only having a long list of voter characteristics to choose from in targeting and the delivery of messages. Now, with enhanced databases that include hundreds of fields of commercial data,

census data, specialty data and individual-level response IDs, modeling techniques are employed to score the voter files with these synthetics. We were now presenting clients with the ability to target voters by partisanship in states that didn't register by Party. We could predict whether a voter would vote even though his vote history may be spotty. Other targeting was available that was completely unique – voters likely to own a gun, to be a hunter, to attend church weekly and many more.

The world of data is ever evolving and largely because we are in the midst of such an explosion of technical innovation. The challenges to keep up with the developments in the online digital world are ever-present and often daunting. It seemed to me then and does now that Catalist is uniquely situated to remain on the cutting edge of those innovations, a posture that can serve the cause of progressive politics quite well.

But Catalist is not the only place where Democrats or progressives go for data, regardless of what we might wish for. A large number of campaigns have access to data that is compiled by the Democratic National Committee through the various Democratic State Parties. There are also vendors who strive to compete in this space, most of which work for campaigns in both parties.

I am no expert on how this is done by Republicans and conservatives but have long been aware of the Republican Party's Voter Vault. It is a national voter file available to GOP campaigns that was once the standard others sought to match. I'm not sure that can be said any more and understand there are efforts among several conservative organizations to begin building a Catalist-like data infrastructure available to conservative campaigns and organizations.

Regardless of where campaigns go to get their data, there is a growing generation of campaigners who understand how important this aspect of campaigning is. While voter contact campaigns neither create nor prevent landslides, they are important in closely contested races. I know of a number of experiences where it was clear that our efforts made the difference. In Mississippi several years ago, for instance, our voter file had been used extensively by an aggressive and expensive phone and mail program in the Governor's race. When the Democrat won by less than 1%, it was hard to ignore the importance of this effort.

In 2008, it became particularly clear that this form of campaigning was effective. The Catalist client base pulls data down from the Catalist online system for voter contact throughout the country. During the Obama campaign, our clients were pounding on our system as never before, using more data for mail, phones and in person contact than we had ever experienced. Also, the response data being obtained through the voter ID phase of the campaign was uploaded to the system, providing us with a large amount of individual data from which we could build models. All of this data, coming out of the database and being added to it, allowed us to measure these efforts against controlled universes, comparing those who were contacted with those who

were not. The results were startling. Voters contacted by at least one of the Catalist clients turned out in considerably greater numbers than those who were not. And among those who turned out, the Obama support measurement was even more gratifying in its effectiveness. In other words, the capabilities created by our models allowed more pinpoint targeting and, as the results have shown, a more effective brand of voter contact.

Attention will now be turned to taking information like the data added to our database in 2008 to try and model communication channels, to discern whether a voter should be contacted by phone, by mail, by email or in person. Increasingly, we will be able to learn lessons important to political success because of the amount of data going into the system and coming out of it.

Computerized voter contact and sophisticated voter files are here to stay. Where they once satisfied the simple desire to make sure a campaign could send mail to a household or contact only those citizens who were registered to vote, it has arrived at a point where individualized and variable communication takes place consistent with what the predictive models tell us to do. For a campaign that in the past used voter file data and always communicated with the 4 of 4 voter, someone voting in the last four elections, a turnout model will now take its place. The greater level of accuracy and possible cost savings will drive this on and into the future.

There have always been challenges in politics, challenges for campaigners to seek the best ways to target voters and communicate messages. That is truer today than ever before. How do we reach the 18-35 year olds in the 21st century? They don't watch commercial television, listen to commercial radio, open their mail, read newspapers or magazines. They can't be reached by traditional phone banking and door-to-door efforts can never be assured. This directs all of us in the business of voter contact to increasingly rely on the digital space, to find ways to better target online communications, to communicate via the social networks, to use those computers on our televisions known as cable boxes to communicate messages to targeted households. And what is being attempted now may become commonplace within the decade. Those of us active in the 2008 presidential campaign are reminded that Facebook and YouTube didn't really exist in the previous presidential contest only four years earlier. Can we even imagine what might exist in 2012 or 2016 or 2020?

This part of politics has come a long way in a short period of time. While computer-generated voter contact hardly existed in the 1980 campaign that had such a major impact on my life, it was my profession only a few years later. While it is still my profession as I write this in 2011, it looks very little like it did when I started my own company 20 years ago. I won't even venture a guess as to what it might look like 20 years from now.