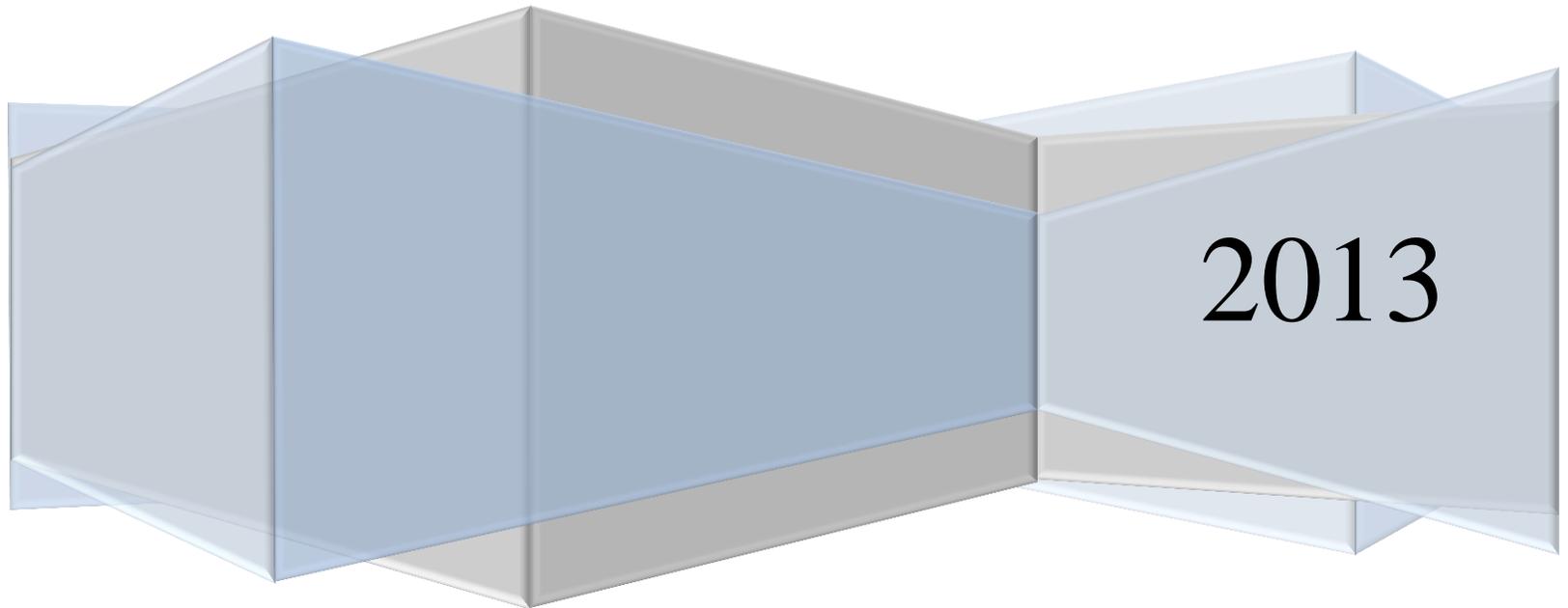


Oregon Congressional District 5 – Case Study
How to Win Competitive or “Blue” Races
Jeff Kubler



2013

Introduction

In 2012, I concluded my 8th year and final year as the Chairman of the 5th Congressional District in Oregon. During that time, I had been involved in the Oregon Republican Party as a member of the State Central Committee and a member of the Oregon Republican Party Executive Committee. During that tenure, I saw what passes for solutions to the existing problems that we as Republicans have versus the evident advantage that the Democrats have with their ground game. Messaging is very important, but from what I have seen in Oregon, the Democrats far exceed the Republican Party's ability to find and turn out their vote. In short, they have a machine and we don't.

As an outgrowth of my long-term interest in bringing change to Oregon by helping to elect Republicans to office, I helped create the company Action Solutions, along with its solutions (www.actionsolutions.net). Action Solutions is able to provide some of the tools as solutions that are needed if we are to bridge the gap between the machine that the Democrats have and the ineffective (as shown by recent electoral results) tools that Republican's tend to re-build every election cycle.

The following case study in how to win the Fifth Congressional seat provides a number of ideas and points of understanding the will help win many races, if applied and if coupled with the serious work of building a get-out-the-vote (GOTV) machine.

An Executive Summary is included in the last page. This may be a good place to start if you have limited time.

CD 5 – Analysis and Keys to Winning the Fifth Congressional District

Introduction

How can the Oregon 5th Congressional Seat be won by a Republican? As the former Fifth District Chairman and now a very interested provider of services to candidates, parties and organizations, this question is of paramount importance. Historically, the Oregon Fifth Congressional District has had a slight edge in voter registrations towards Republicans. However, we have had a Democrat in the seat for many years. What follows is an analysis of the District, the past vote and a clue to what might be a key towards winning the seat for Republicans.

2010 National and State-wide Outcomes

In 2010 there was a wave of change that hit the United States Electorate. Nationally, Republicans picked up many seats in the House of Representatives, and some additional seats in the Senate, too. As a result, Republicans now control the House and the battle in the Senate is closer. State-by-state, Republicans picked up many seats. The following graphic shows the state-by-state results:

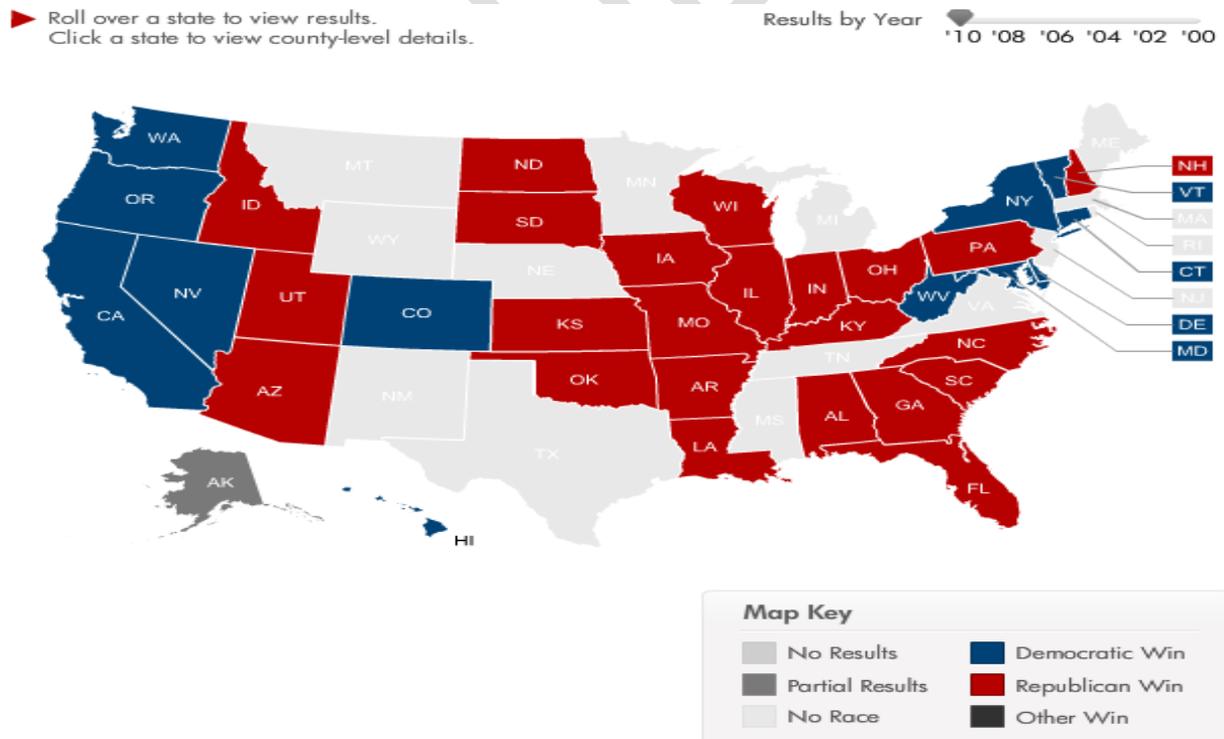


Figure 1 – National Results

What happened to the west coast? And in particular, what happened in Oregon?

In Oregon, the labor unions mounted an incredible campaign, turning in 91,000 ballots that had been collected from within Multnomah County (the notoriously liberal Portland metropolitan area) alone on Election Day. Because of this effort, the red tide that hit the nation, in some ways, missed Oregon. The labor unions, working for Democrat candidates, have a very effective GOTV effort. The evidence for this is the fact that they could mount such a massive effort in a non-Presidential election year.

In the 5th Congressional race, the Republican Party fielded a strong candidate in State Representative Scott Bruun. With Kurt Schrader, defending his seat for the first time, this was seen as an optimum time to get this seat back in Republican hands. However, Schrader, the Democrat, kept his seat.

For the Gubernatorial race, John Kitzhaber, took the seat for his third time away from newcomer Chris Dudley. In the Oregon House, six seats were gained back from Democrats and in the Oregon Senate two seats and almost a third came back to Republican hands. In a historic first, the Oregon House has a 50-50 split meaning, no one party could hold the seats of leadership.

Current Registration Breakdown

What is the current breakdown of Republicans, Democrats and Unaffiliated Voters in the 5th District? From Votervault:

Republican	160,969
Democrat	184,588
Independent	0
Other	23,386
Unidentified	97,766
	466,709

Percentages: Republicans: 34.5%, Democrats: 39.5%, Unaffiliated: 25.9%.

Last Election Results

Scott Bruun a several term Oregon House member challenged incumbent Kurt Schrader in what many hoped might be the best opportunity to pick up the congressional seat in many years.

United States House election, 2010: Oregon District 5				
	Party	Candidate	Votes	Percentage
	Democratic	Kurt Schrader	145,319	51.25%
	Republican	Scott Bruun	130,313	45.96%
	Pacific Green	Chris Lugo	7,557	2.67%
	Misc.	Misc.	367	0.13%

Figure 2 – Fifth District Results

What was the result of the 2010 election pitting Kurt Schrader against Scott Bruun? 51% of the vote went for Kurt Schrader, while 47% of the vote went for Scott Bruun.

Who voted in the 2010 election in the 5th?

279,861 people voted in the 2010 election. The average age of the voters was 54.6 years.

The following data was compiled from a list of those who voted in the 2010 election.

Of those who voted, what was the percentage based upon the registration:

- 42.3% Democrats or 118,209
- 38.9% Republicans or 108,918
- 18.8% Un-affiliated (includes minor parties) or 52,734

How did that vote likely get distributed? Assuming all Republicans voted for Bruun, and all Democrats voted for Schrader, to get the totals for voting from the registered numbers of Democrats we have to add 27,110 un-affiliated voters to the Democrats to get to Kurt Schrader's vote ($145319 - 118209 = 27110$). To get to Scott Bruun's vote total we have to add 21,395 votes from un-affiliated voters to come up with his total ($130313 - 108918 = 21395$).

Using the added back votes, we can calculate the percentage of voters in the un-affiliated voters that voted for each candidate. The percentage of voters from the unaffiliated group who voted for Schrader is 56% ($27110/48505 = 0.5589$). The percentage of voters who voted for Bruun from the un-affiliated groups is 44% ($21395/48505 = 0.4411$). In summary, un-affiliated's broke to Kurt Schrader 56% to 44% for Scott Bruun.

So we find that un-affiliated are voting more for Democrats than for Republicans. Is this what we should expect from the un-affiliated voter?

Polling Results for Unaffiliated Voters

What is an un-affiliated voter? Simply, someone who does not align with either party, they often consider themselves members of the “Independent” Party.

What are the Unaffiliated like in the state of Oregon? On specific issues this is how they polled:

% NAVs with Conservative Views	Strong	Somewhat	Total
	Conservative Position	Conservative Position	
Obama Job Performance	38.1%	13.7%	51.8%
Arizona Law	53.5%	13.7%	67.2%
Early Release	56.8%	21.5%	78.3%
Tax Increases	56.1%	18.3%	74.4%
Spending Increases	50.2%	21.0%	71.2%
Education Funding	8.8%	45.2%	53.9%
Generic Ballot	29.4%		29.4%
Ideology	28.0%		

Figure 3 – Un-affiliated Conservative Views

From this table we find that 78% un-affiliated voters are against early release of criminals. We find that 74% are against Tax Increases, 71% are against spending increases, 67% are for the Arizona Law on Immigration, and 52% have a poor rating on Obama's Job Performance. Even though they might describe themselves as “un-affiliated” their particular leanings on the issues paint them as conservatives.

Where did this polling and data come from? This came from the Oregon 2010 Project

Oregon 2010 Project

This project, funded by the Oregon Republican caucuses in the state House and Senate, in addition to candidates themselves, accomplished the following:

- Developed a survey to identify NAV (un-affiliated voters) on critical state issues.
- Purchased higher quality data with much more reliable phones matched to voters
- Delivered the survey using automated method
- Delivered the survey using a live callers
- Identified about 55,000 conservative, un-affiliated voters based upon their responses.
- Ran automated messages on behalf of Oregon House and Senate Candidates
- Ran a live 55 seat paid call center targeting 13 Senate races and 26 House races
- Delivered messages to lower propensity Republican voters
- Delivered messages to conservative leaning NAV (un-affiliated voters) linking Senate and House candidates to their shared issue to get there vote out.

For the survey, an automated survey was the first approach. This was followed by a live survey. The questions dealt with the following:

- Obama’s job performance
- Immigration laws related to illegal aliens
- Laws on crime
- Tax increases
- Spending increases

From the survey (figure 3), we discovered that the majority are unhappy with Obama’s performance, favor strong laws against illegal immigration, want tough laws on crime, are against tax increases, and against spending increases. These results sounds pretty conservative don’t they? Yet they voted in majority for Schrader?

Higher Quality Data

Why did the project require higher quality data? Because Votervault (now GOPDATACENTER) has not spent enough time and money on matching phones to voters for the best accuracy, the addresses are solid, but most people don’t volunteer their phone number when they register to vote. To add the phone numbers, many other sources must be used to try and match a phone number to the address. Many commercial companies have made it their expertise to create processes to accomplish this matching. With Votervault, sometimes multiple people are matched to the same number, as in the following example:

The screenshot shows a search interface for Votervault. It includes several input fields: Address (with instructions: "Please enter the voter's address (eg. 713 S 12TH ST). For best search, enter the street directional (eg. N, E, NE) and street type (eg. St, Ave, Ln)."), City (with instructions: "Please enter city.(eg. BURLINGTON)"), Zip (with instructions: "Please enter zip code.(eg. 52601)"), Phone (with instructions: "Please enter phone.(eg. 412-687-2457)"), Registration Number (with instructions: "Enter registration number (eg. 0001551071)"), and 5 + 5 (with instructions: "Enter up to the first five letters of the voter's last name and up to the first five digits of the voter's house number (eg. jones123). Do not include spaces in the house number."). There are radio buttons for "Exact Match" and "Closest Matches", a "No of Records to display (1-25)" dropdown set to "10", and buttons for "Search Now", "Clear Search", "Previous", and "Next". Below the form is a table with the following data:

Last Name	First Name	Middle Name	Address	City	Phone	Party	County
EDWARDS	CHRISTINA	L	340 FOCH ST	EUGENE	541-687-5972	D	LANE
EDWARDS	CHRISTOPHER	D	1840 RIDGLEY BLVD	EUGENE	541-687-5972	R	LANE
EDWARDS	MARY	S	2138 OHIO ST	EUGENE	541-687-5972	R	LANE

Figure 4 – Votervault Example

The conclusion from this is that, any successful project must consist of the purchase of high quality, commercial data with improved accuracy in the matching of phone numbers to names and addresses.

Oregon 2010 Results

The project identified some 55,000 un-affiliated voters based upon their responses to conservative values questions. These identified un-affiliated voters became part of the larger GOTV project affected in the Oregon 2010 Project. A 55 call center worked to do the following:

- Developed call center software
- Hired 150 people and trained them

- Ran a live survey
- Ran a live GOTV project
- Managed paid walkers – created walking list plan to distribute literature for candidates
- Increased lower propensity voter turnout
- Reached un-affiliated voters with message tying the shared value to the Republican Candidate and asking for the vote.

The script used to get un-affiliated voters to vote for the Republican candidate was:
Sample Script

Republicans - #2: robwheelerforsenate.com

Hello, is _____ there?

Hi this is (first name) and I'm making a courtesy call to see if you've had the chance to vote and return your ballot yet?

If Yes: That's great! Has everyone in your household voted as well? Thank you and good bye.

If No: I'm calling on behalf of Rob Wheeler running for State Senate. As you might know, the polls are showing the races are going to be very close. Every vote is critical. We hope you will vote Republican and if you would vote now it can save us a lot campaign money. And you won't get any more calls like this... Do you know your nearest ballot drop location? To help us win, would you be willing to return your ballot today?

[If they ask about candidate]: Rob Wheeler is a great candidate who needs your vote. He is the mayor of Happy Valley, works in a small business, and knows about creating jobs! He never would have voted for the job-killing tax increases that his opponent voted for! And he will be tough on crime, unlike his opponent who voted to give 3,000 criminals early release from prison.

With the paid callers in the call center the Oregon 2010 accomplish the following:

10/18/2010	12,437
10/19/2010	16,927
10/20/2010	19,809
10/21/2010	19,538
10/22/2010	21,475
10/23/2010	22,281
10/24/2010	22,400
10/25/2010	24,411
10/26/2010	21,890
10/27/2010	21,200
10/28/2010	24,532
10/29/2010	25,421
10/30/2010	31,827
10/30/2010	27,571
11/1/2010	24,975
11/2/2010	24,191

Total	360,885
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In summary, the project accomplished the following: Created and ran voter ID surveys, developed call center software, hired 150 people and trained them, ran a live survey, ran a live GOTV project, managed paid walkers, increased lower propensity voter turnout, reached un-affiliated voters with message tying the shared value to the Republican Candidate and asking for the vote, helped elect 6 House members and 2 Senators with almost a 3rd winning, targeted 1/3 of the state. Additionally, the use of paid callers allowed for the more focused ability to call during the critical last few days of the election - A time when every call might yield a potential vote! Volunteer calling simply cannot deliver those calls when needed as the intensity of calling cannot be mounted until Monday, when the volunteers feel panicked about the results. The highest intensity of calls must be made from Friday through Sunday, as this is when people typically vote (Oregon is a vote by mail state)

A project, similar to what has been done but multiplied by 3 must be set into place in order for Oregon Republicans to win big in the next races. Having the calling set and provided for with paid callers would allow for the expansion of walking and collecting of ballots as the democrats have been able to do.

Oregon 2010 Project versus various Volunteer Phone Efforts

There is an ideal, a dream, that volunteers can put forth the needed effort to get out the Republican vote! Campaigns like this dream because it would free up all of the money raised for the air war (TV) and for printed media. However, we are far from this ideal. You might notice, as I have, that the Democrats no longer participate in the yard sign battle. Why? Because it is passé. is the Democrats are all about GOTV and they are beating the Republican Parties volunteer effort in every way.

The reality is this: the Democrats mount either a paid (professional) calling effort or a pseudo-professional effort with union members who understand that they must be in the calling seat. The Democrats fill their calling seats, making advocacy calls, followed by GOTV calls, they have walkers out picking up ballots (using hand held devices), they have a very developed voter registration effort (with groups like ACORN), and they even call outside of their registration base of Democrats.

An analysis of the calling done during the 2008 effort showed the following:

The calling effort greatly underperformed its potential

The volunteer calling effort could not mount the level of calling needed in the 5 to 6 day period that is critical to get the vote out just prior to the Tuesday Election Day.

Areas of the state that could benefit from GOTV calling are not able to be called because the effort underperforms.

No analysis is available for the Measure 66 and 67 Election or for the 2010 election.

The upshot of this analysis is not to demean those who participate in the effort, but simply to point out the fallacy in our methods. We cannot hope to compete against a professional work force with volunteers.

How did the un-affiliated's vote in the 5th District?

Knowing that the outcome is 51.5 to 45 and about 3 percent voted for the Pacific Green Party we can do the following: add 9.2% to 42.3, gives Schrader's percentage, adding 6.1% gives Bruun's result. 9.2% plus 6.1% equals %15.3 and the rest Green Party and other candidates. However, looking at the un-affiliated response to the above questions, we find that had they voted on their agreement with Scott Bruun's likely alignment on the Early Release issue he should have received almost 12% of the un-affiliated vote. Instead, he got 1/2 the number of votes he should have received from un-affiliateds.

What needs to happen for our candidates to win?

Un-affiliated voters poll conservative on specific issues, yet they tend to vote Democratic? Why? Democrat and Republican voters usually vote in the low 80's as a percentage of the registered voters, yet un-affiliated voters vote at about a 50% rate. I believe we must assume Democrats have identified the un-affiliated voter and now target those voters they want to vote and get them out!

What have Republicans done regarding the un-affiliated voter? Nothing that I am aware of, we are working hard and yet not getting our entire vote out (276,000 didn't vote the last election). The Oregon 2010 Project is the only project to have included un-affiliated voters in the project's planning. The project identified voters and added those identified un-affiliated voters to GOTV effort, but with specific messaging on issues and not with a Republican message. It is my opinion that this caused the voter to cast a vote for the Republican running for the lower ballot race and then to vote for the Democrat in the higher profile race.

Matt Wand's race in House District 49 is an interesting example. House District 49 is located within the 3rd Congressional District (Multnomah County, Portland) and went very dramatically for Democratic Congressman Earl Blumenauer. However, in the 49th District, Matt Wand outperformed the norm in the 3rd District. In the 49th district there were: 5,770 Republicans, 7,974 Democrats and 3,721 Un-affiliated voting. Yet Wand received 8,967 votes to his opponents 7,857. That means that Wand received 85% of the un-affiliated vote! This was a district that the Oregon 2010 project called with messages tying Wand to specific issues that resonated with the un-affiliated voter.

It is my opinion that it will take the following steps to being to win big races in Oregon:

- **Candidates and parties need to work back from Election Day!** Investment should be made into the most effective GOTV strategies first!
- At least 5-10% of any candidate's income must go to these strategies. Currently, my understanding is that candidates spend very little if any on the ground game, often trusting in the state or local party's abilities to fill this critical need.
- Currently, parties only cover perhaps 1/3 of the state. The effort is completely un-measurable and un-managed.
- Democrats have: calling (GOTV and advocacy), walking, registering, and ballot collection, paid walkers, paid callers.
- Democrats can call their voters and try to influence ours. We barely touch our republican base! Why, because we rely on volunteer calling efforts. **IF WE CONTINUE TO RELY ON THESE EFFORTS AS THE MAINSTAY OF THE EFFORT, WE WILL CONTINUE TO LOSE OUR STATEWIDE RACES! Hoping that volunteer call centers will be adequately staffed is an unrealized dream. And, the new hope that volunteers can sit at home and use internet based calling systems is also an unrealized dream. Calling is hard!**
- A 165 seat paid phone bank is a requirement for winning next November

- The 1st Congressional District needs at least a 30 seat paid effort
- A four tiered approach to Voter ID: automated, live via phone, email, and live walkers.
 - Targets: un-registered, non-voting Republicans, un-affiliated, Republicans, and Democrats
 - Those identified on the issues should be added to the GOTV efforts but with a specific message about the Candidates agreement with their issue.
 - **IT SHOULD BE REALIZED THAT A YEAR AROUND VOTER ID PROGRAM IS A MUST AS WE MUST FIND LIKE MINDED VOTERS TO APPEAL TO, WHO WILL VOTE IN AGREEMENT WITH OUR ISSUES!**
 - **The identifications on issues of voters who are not republicans could be fed into another program for encouraging these voters to register as republicans.**
- A Team of (the ideal would be for paid) walkers should be the core of a walking effort to go door-to-door to collect ballots from non-voting Republicans and identified un-affiliated voters.
- Action Solutions has call center technology, and automated calling surveys are our expertise.
- Recommended Order of Priority
 1. Paid Callers
 2. Purchase higher quality lists that can be added back to Votervault. **It isn't the technology at this point that is the failure it is the matching of phone numbers to names.**
 3. Voter ID surveys (automated, live, door-to-door, email, etc.)
 4. Walkers for GOTV. The challenge of gathering phone numbers is growing. Going door-to-door to collect ballots is a must! Technology exists to map locations of those who haven't voted and team can be sent out to collect ballots.
 5. Hand held devices and other technology. These will be utterly useless, sitting in and office somewhere and unused unless we pay a work force for callers. Voter ID Surveys need to be going at all times. These should be done at all times but will be most effective when done fair away from elections.

What could have happened in the 5th Congressional District race with more effective Voter ID and GOTV efforts to match the ID?

Is the 5th Congressional Seat a winnable race? Yes, I believe that the 5th is a fully winnable race! And redistricting has improved that even more. We must identify and get out our vote, particularly the un-affiliated vote. Projects can be devised to invite the conservative un-affiliated voter into the party. So we can increase the team. What if the un-affiliated vote had voted like they polled in the last election??

- Let's say the un-affiliated population voted in proportion to the polling we conducted:
 - Bruun = $108,918 + (52734 * .65) = 143,195$
 - Schrader = $118,209 + (53734 * .35) = 136,665$
- OR Bruun = $108918 + (52734 * .60) = 140558$
 - Schrader = $118209 + (52734 * .4) = 139302$
 - Bruun wins!

Executive Summary

The Democrats have a machine, and the Republicans must build one if we intend to win. The machine must work at all times and not just during the traditional election season. The identification of conservative unaffiliated and Republican voters will lead to targeted GOTV efforts and unaffiliated voters voting for Republican candidates, along with more Republicans casting their votes for Republicans.

The effort must consist of the following points:

- **The development of automated, live (via phone) and live (via walking) Voter ID Surveys.**
- **The delivery of lower cost VOTER ID SURVEYS to targeted groups, followed by higher cost live surveys and finally door-to-door collected voter ID surveys. This is the critically important first step in the plan.**
- **The voter ID surveys will provide needed targets for getting out the vote based upon shared values. Then the survey results will provide needed targets for a re-registration effort to get those who vote with us on issues to register with us.**
- A four tiered approach to Voter ID: automated, live via phone, email, and live walkers.
 - Targets: Un-registered, un-voting Republicans, un-affiliated, Republicans and Democrats
 - Those identified on the issues should be added to the GOTV efforts but with a specific message about the candidate's agreement with their issue.
 - **IT SHOULD BE REALIZED THAT A YEAR AROUND VOTER ID PROGRAM IS A MUST AS WE MUST FIND LIKE MINDED VOTERS TO APPEAL TO, WHO WILL VOTE IN AGREEMENT WITH OUR ISSUES!**
- A team of (the ideal would be for paid) walkers should be the core of a walking effort to go door-to-door to collect ballots from non-voting Republicans and identified un-affiliated voters.
- The Voter ID effort will lead into an all-encompassing GOTV effort that must target voters state-wide.
- Recommended Order of Priority
 1. Paid Callers
 2. Purchase higher quality lists that can be added back to Votervault. **It isn't the technology at this point that is the failure it is the matching of phone numbers to names!**
 3. Voter ID surveys (automated, live, door-to-door, email, etc.)
 4. Walkers for GOTV. The challenge of gathering phone numbers is growing. Going door-to-door to collect ballots is a must! Technology exists to map locations of those who haven't voted and team can be sent out to collect ballots.
 5. Hand held devices and other technology. These will be utterly useless, sitting in and office somewhere and unused unless we pay a work force for callers.

Voter ID surveys need to be going at all times. These should be done at all times but will be most effective when done well in advance of elections to allow for campaigns to get the utilize the information and get the most out of the data.

Note: the suggestions in this document are oriented towards a full scale Republican Party effort to identify and get out the vote. However, parts of this effort could be undertaken by an outside group. Any group willing to identify on the issues and collect the results could then do their own GOTV effort, or provide the needed data on identifications to a campaign or party for use.

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