

DigiDems collaborates with Democratic campaigns and organizations to ensure they have the skills, resources, and support necessary to win. In 2018, DigiDems pioneered a new model: we recruited 80 technologists and embedded them on campaigns across the country to help establish best practices for digital security, improve campaigns' use of technology, and design and execute scalable digital outreach programs. In 2019 and 2020, DigiDems remains focused on ensuring progressive campaigns have both the talent and the technology necessary to succeed up and down the ballot.

## What is RVT?

RVT stands for Relational Voter Turnout. Traditional campaign outreach methods rely on paid staff or volunteers reaching out to strangers usually by canvassing or phone banking. Relational organizing leverages the pre-existing relationships of supporters in order to reach out to their friends, neighbors, and colleagues, whether via technology or other means. This document focuses on RVT's technology implementation, not on RVT as a practice.

## DigiDems RVT Observations

In 2018, DigiDems recruited, trained and placed 80 technologists on competitive campaigns across the country. Their training introduced them to various campaign tools, among them the current crop of RVT products. On their campaigns, several DigiDems were given primary responsibility for managing RVT programs, since they were seen as an "extra resource" and a "tech expert" capable of testing this new concept.

The following is a vendor-agnostic overview of what DigiDems in the field encountered as it relates to RVT in 2018.

This overview does not make any observations regarding the effectiveness of RVT generally; others have far more data and standing to do that. We instead focus our observations on the **operational challenges** that impacted the effectiveness of RVT in 2018. These challenges can be overcome, are not inherent flaws or fatal problems, but must be faced if RVT is going to realize its potential, an outcome that we are rooting for.

### Overview

- Early buy-in is needed at all levels (party committee, campaign leadership, field/organizing team and volunteers).
  - RVT cannot be done half-heartedly
  - Building RVT capacity/scale should be done early in the campaign cycle
- Greater focus needs to be placed on everyone's experience using RVT: "very easy to use wrong, but very hard to use right."
  - RVT requires training for both campaign staff on building the program/how to train volunteers **and** for volunteers on use of tools/apps
  - User training needs to focus on specific strategies and tactics to achieve results
- Adopters of RVT should be realistic about the effort necessary to set-up and run an effective program.
- Adopters of RVT should map metrics and goals to more traditional activities in order to increase value assigned to RVT by campaign staff.

- Scaling the reach of RVT was a challenge.
  - May be a better fit with activist groups (who are building their networks all year every year) than campaigns (which are temporary).
  - Need to devise and test new tactics/strategies for scaling network and improve matching.
- Volunteer discomfort with RVT needs to be addressed:
  - High risk to “talk politics” with your personal/professional contacts
  - Privacy concerns - difficult to “explain away”
  - Cadence of requests to share/contact created fatigue and risk
  - Demographic challenges: older volunteers (not tech savvy) and younger volunteers (concerned about invasiveness)
  - User Experience on the Volunteer side needs to be a primary consideration, needs to be minimal friction for users being asked to take actions
- There are success stories to learn from.

## Buy-In and Roll-Out

- RVT was not a well-understood or supported concept for most of the folks in charge of setting the strategy for the campaign.
  - Given its relatively unproven state, most managers did not provide ample resources or staff to create an impactful relational voter program.
- Secondary hurdle came from field teams who were supposed to run RVT programs. Field managers feared RVT would:
  - Discourage volunteers from engaging in traditional field activities
  - Overburden volunteers and risk them not signing up for a repeat shift
  - Inadvertently turn out opponent’s voters
- Lack of buy-in (at whatever level) led to lack of motivation from staff/volunteers, even when there was a dedicated person running RVT.
  - The emotional energy it took to convince staff and volunteers to participate became dispiriting to people running RVT programs.
- Rollout of the products to some, but not all, campaigns (and at varying times during the cycle) left many campaigns confused and unable to plan for RVT. Caused some to completely de-prioritize and remove RVT from their strategies.
  - Needs to be part of strategy and available from the start, not added mid-way through cycle.
  - Communication on timing/plan for roll out needs to be simple, consistent, accurate.

- Need to think about who really owns RVT on a campaign.
  - Some campaigns did NOT have field teams until very late, which hamstrung RVT campaigns.
    - Because successful RVT requires recruiting and training a scaled-out pool of volunteers, waiting for the Field Team to exist caused a late start to recruitment, leading to a small pool of volunteers, limited reach and limited effectiveness.
  - In other cases field teams were subsumed / overtaken by the coordinated campaigns, so RVT efforts by the campaign itself had to be transitioned, leading to a loss of effectiveness and a perception of wasted time.
  - Reliance on field organizers to undertake relational organizing efforts can hamstring the development of successful programs, given the existing burden and expectations on field organizers.
    - Sense that it was not the campaign leadership's priority filtered down.

## Experience of Staff

- Tools often became available in the middle of a campaign, landed with little direction or guidance when staff didn't have time to attend trainings or webinars.
  - Already-burdened staff had to figure out how to utilize the tools effectively with little guidance.
- Need comprehensive training across many more use cases and wide range of volunteers, districts, and issues that came into play when trying to build a successful relational voter turnout program.
  - Easy to use wrong, difficult to use right.
  - In almost every implementation of relational organizing, DigiDems created their own training materials (PDFs, videos, walkthroughs), which is not optimal.
  - Need to train BOTH staff and volunteers, or (ideally) make training unnecessary for volunteers through improved UX.

## Operationalizing and Scaling RVT Programs and Networks

- The effort required to build a successful relational voter program was underestimated by both campaigns and vendors, leading to dissatisfaction.
- Successful RVT campaigns require early and sustained effort to build a large pool of RVT volunteers so that the social connections of these volunteers, in aggregate, is large enough to have an impact.
  - Many RVT programs started late, by which time they were often an afterthought and never had time to achieve significant reach.
- To be successful requires effort, focus and priority at every stage of program: Initial setup, field training, volunteer onboarding, content creation, ongoing management.

- Need clear and distinct translation of metrics relative to other field efforts (e.g. 100 texts sent to friends = 100 door conversations).
  - o Need “goals” orientation to make clear how RVT should be viewed over time.
  - o Goals need to represent value to the campaign in terms of votes or dollars.
  - o Need some kind of build and monitoring outline to integrate into goals-based structure of field programming and organizer responsibilities.
- Generally hard for campaigns to expand their reach effectively beyond their known networks.
  - o When they did, it often brought in people who were either already in communication with the campaign or did so in very small increments (e.g. number of matches was typically less than 10 people).

## Volunteer Discomfort

Experience of volunteers needs to be a primary consideration and focus paid to overcoming their discomfort.

### *Social Discomfort*

- o Unwillingness to engage in political conversations or share politicized content with friends and family.
- o Volunteers, somewhat paradoxically, were more comfortable talking with strangers (doors, phones) given the fraught nature of politics.
- o Risk to volunteers in alienating their friends and families was often not a risk they were willing to take.
- o In some cases, tools sent messages to work or professional contacts, which was even more risky and could have serious consequences.
- o Did not want to utilize and spend social capital/alter their curated personal brand online to parrot talking points or persuasion messaging from the campaign.

### *Privacy Concerns*

- o Volunteers did not like the idea of giving the campaign or a third-party (vendor) access to their private contact data.
- o Despite attempts to convey that the apps/campaign would never have unfettered access or abuse the information, volunteers remained largely skeptical (logically so, given the privacy climate in which these tools must operate).
- o Volunteers were concerned that the campaign could monitor and view conversations they were having with their contacts. Explanations only went so far in assuaging this fear.
- o “Explaining away” these concerns to volunteers does not scale (often on a 1:1 basis) and is only marginally effective, anyway.

### Fatigue

- o Some volunteers balked at the extra time, effort, and personal social capital RVT required of them, in addition to what was being already asked (traditional activities).
- o Some volunteers expressed frustration and/or concerns with frequent requests to share content or contact friends. They felt they were “spamming” their contacts.
- o In many cases, since volunteers had only matched with a small number of contacts, it didn’t make sense to use the apps continually over time to contact less than 10 people.
- o When it came to sharing FB content, volunteers were wary of turning their personal feed into a replica of the campaign’s feed.
  - Many volunteers only shared 1 - 2 pieces of content the entire cycle and resisted continued usage.
- o Hard for volunteers to grasp the value of relational organizing in a tangible way that encouraged their participation.

### Demographic and Technical Issues

- o Many volunteers were older or less acquainted with digital outreach.
- o Especially among older volunteers, many did not have accounts on the services required (e.g. Facebook).
  - Even when they did have accounts, they did not have much reach given their relatively low usage levels of these platforms.
- o Younger volunteers were also skeptical as they felt RVT was invasive (data collection & privacy).

### Usability

- o Downloading, installing, and learning unfamiliar Apps was a significant barrier to volunteer adoption.
  - Exacerbated by the fact that people felt there were easier, perhaps more effective, ways to perform outreach with Apps they already understood and used, such as Facebook.
- o Consensus that there were simpler ways to do the tasks asked of volunteers without the use of an independent app (such as asking volunteers to share content on Facebook by using a private FB group or having them text a few friends using commit cards).
- o The quality and usability of RVT apps is significantly below that of the consumer Apps which led to bad first experiences by the set of volunteers who were willing to try them.
  - Organizers felt it took too many steps to complete basic actions (e.g. sharing, emailing, texting) and that with each “step” their task of onboarding and training volunteers to use these tools became significantly more difficult.
  - Many times what would happen is volunteers would complete some steps and then say they would complete the rest later (but never actually did).

- o Many DigiDems felt the apps didn't "meet people where they were."
  - Required effort to build scale on a new platform, rather than tapping into the strength of existing platforms (e.g., FB) that were already popular meeting places for volunteers and digital activists.
- o One missed opportunity was the fact that volunteers did not have visibility into who else was participating in RVT for the campaign.
  - Having visibility into who else was on the apps and how often they were doing RVT-based actions may have helped to provide the social pressure and camaraderie needed to encourage greater participation and action.
- o Because of limitations in how they integrate with social media services, RVT Apps depend on volunteers to self-report their actions. As a result, cases where volunteers failed to perform actions (but reported that they had) eroded Field Organizers' trust in the tools and RVT overall.

### *Performance Issues*

- o Applications' quirks / bugs and unscheduled downtime eroded trust with:
  - Skeptical campaign staff who saw them as over-promising / under-delivering like tools that have come in previous campaign cycles.
  - Volunteers who entrusted their data to these tools lost confidence in the security or management of data.
  - Field organizers were unable to complete onboarding due to unreliability. If apps took a long time to complete basic tasks, it would disrupt and derail onboarding sessions. So much that some field organizers started to simply avoid promoting the apps.
- o In general, since tech is often already viewed skeptically on campaigns, early mistakes or issues with feature rollout / reliability creates additional challenges to recovering trust, and in some cases may never be recoverable.

### Successes to Learn From

- A DigiDem in Pennsylvania focused less on building scale (number of volunteers using the tools) and, instead, focused on getting key influencers involved, so they could be the starting point for distribution.
  - o Network using the tool was only 50-75 people, but they were able to amplify things they were asked to share, because when they posted it gained attention.
  - o Influencers would be, for example, key figures on college campuses, which was a demo they were focused on turning out.
- A DigiDem in Washington - built a "digital amplification team" to help in social media influencing, be a "megaphone" for messaging and rapid response to attacks.
  - o Done using standard communications tools, rather than RVT-specific tools.

- o Identified the most active Facebook supporters who regularly posted on the campaign site, people who had decent networks and were already active.
  - o Recruited them to Digital Amplification Team directly (1:1 communication).
  - o Comms director set the top priorities of the day.
  - o Emailed that out to the Digital Amplification team with links and posted articles to comment on. They went on Facebook and posted from home and when time permitted.
  - o Segmented based on ability to post about (or preference for) key subject. Tailored outreach based on their preferences (1:1 email, group email, FB Message, etc.)
  - o Analogous: “Letters to the Editors” team (online submission format) comprised of volunteer supporters. ~25 volunteer supporters to commit to writing at least 1 letter per week until the election. Campaign provided guidance on subject matter and specific articles to write in response to.
  - o Did use RVT to get volunteers to specifically find other potential volunteers from their network, with some success (but lots of hesitation due to privacy)
- A DigiDem in California used RVT to help prioritize organizing efforts.
    - o RVT made it easy to notice which volunteers were personally connected (phone/email) to people in the target universe.
    - o This visibility made it easy to prioritize organizing efforts – maximize return by hounding the most connected volunteers instead of investing time in them all equally.
    - o Texting acquaintance-contacts can be made fun – interns often did this at a bar.
    - o “What’s up? Did you vote?” was the message volunteers felt most comfortable sharing.
    - o Once volunteers were actually messaging their in-universe friends, they did get a lot of responses, and quickly. People were amazed at responsiveness.
    - o It didn’t necessarily lead to tons of IDs—it turns out people don’t always know their contacts or feel comfortable texting them about voting.
    - o RVT helped ensure the candidate’s FB content got in front of in-district voters. While his FB audience was national, had an easy mechanism to ensure well-connected volunteers re-created similar posts for their audience.
    - o The efficacy of this content sharing was a little difficult to track and could use some additional tooling, but there were weeks where this campaign led the nation in RVT app content sharing.

Have questions or comments?  
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