STATE
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DATA & ANALYTICS LANDSCAPE REPORT

Executive Summary

Three clear trends in American politics—the rise of sophisticated data and analytics, the nationalization and polarization of elections at every level of the ballot, and the persistent gap in funding and understanding of state legislators and state legislative elections by many but not all actors—have led to a distinct set of challenges. Political actors—elected officials, advocacy groups, partisan organizations, and others—have never had more of an appetite for data and analytics products than they do now. Very few of those tools were developed for state legislative work, and many of them struggle mightily with the bewilderingly complex set of elections that make up the state legislative landscape.

- Analytics, polling, modeling, data, technologies, and tools intersect with every part of the work of legislators and the organizations that support them. These are the key themes that will run through all of the more specific recommendations contained in this document:
- National organizations that are focused on the state legislative level of the ballot benefit from working with state and local organizations whenever possible to incorporate valuable on-the-ground knowledge in their district-level targeting decisions.
- Hard-side campaigns and committees benefit when they communicate priorities and key campaign information.
- There are lots of data sources available for free or for affordable costs (national partisan and ideological models, historic indices and results, data exchanges, etc.) that perform well at predicting outcomes, but organizations on the whole do not leverage these sources as effectively as they could.
- Existing state polling, modeling, and research consortia could better serve the needs of hard-side campaign users and other national groups.

About This Report

This report is the product of months of detailed research with analytics practitioners and users across a range of state legislative roles. A detailed methodology section can be found in the appendix at the end, but it's worth emphasizing that while many of the tools we discuss are quantitative, this research was primarily qualitative in nature. We are grateful for the generosity of time and expertise of the people whose experiences made this report possible.

The first section lays out the framework of decision making that we have used throughout this process. After that, our findings are organized into several sections: **tiering, polling, modeling, testing, data warehousing, staffing,** and **longer term thinking.** In each, we lay out challenges facing organizations in the state legislative space and concrete recommendations for tackling each.

Introduction: Four Levels of Analysis

There are four levels of decision making at the state legislative level that can be informed by data and analytics:

- Which chambers to invest resources
- Which districts within specific chambers are represented by persuadable lawmakers or are electorally competitive
- Which voters within those districts are key targets, and with what messages
- Which policies constituents support when legislatures meet to make laws

Chamber Decision Making

For many legislators and legislative support organizations, the chamber level of decision making is extremely easy. If you are a legislator in Wisconsin, then while allocating resources between the Assembly and the Senate may take a little bit of work, no attention needs to be paid to the other 49 states in the union. For organizations that are national in scope, however, the most crucial set of decisions is identifying target chambers.

Every organization will have its own metrics and standards for investment, depending on their internal goals and priorities, but almost everyone who is interested in state legislative policies or elections cares to some extent about chamber competitiveness.

Gerrymandering at the state legislative level is often more severe than at the Congressional level, and there are 99 different opportunities to do it in a different way. The result is the same, however, because control over the vast majority of state legislative bodies is not competitive between major parties in a given election cycle, and only a few more are likely to be competitive under 10 years of a given map. For organizations that strongly prioritize chamber competitiveness this narrows the options, but it also raises the stakes. The right combination of political environment, issue salience, and candidate quality to make a chamber competitive may only come once in a decade, but that window may not be obvious a year ahead of time.

District Decision Making

Understanding chamber competitiveness, of course, requires understanding the range of outcomes of the individual districts in the body. Assessing individual district competitiveness is an art as well as a science. As political polarization has deepened across the American electorate in recent decades, state legislative races, especially open seats in chambers with term limits, have begun to more predictably mirror the partisan behavior of races higher on the ballot. Candidate traits and incumbency, however, do still impact electoral outcomes and policy positions, and narrow majorities are often made possible by legislators who outperform their fellow partisans or cross the aisle.

A well-constructed historical partisan index, like the National Committee for an Effective Congress's (NCEC) Democratic Performance Index (DPI), was the single best predictor of state legislative outcomes in the research we assembled[1] after the 2022 elections. If an organization had access to only one tool to make individual race investment decisions, it should be a high-quality historical partisan index. Accordingly, one of the key recommendations of this report is to make access to high-quality historic partisan indices more readily available.

Historic results, however, cannot tell the whole story. We are in the midst of a fundamental demographic political realignment—with college educated voters, particularly suburban women, becoming more Democratic while non-college educated voters, especially rural men, becoming more Republican. This realignment[2] shakes up political geography; focusing purely on historic results may under-state Democratic opportunities in suburban areas and under-state Republican opportunities in rural ones. This realignment is probably not finished, but it does not move in a linear fashion and is difficult to predict ahead of time.

Finally, and most importantly, historic indices do not capture the impact of incumbency and candidate quality. As state politics are increasingly nationalized and polarized, the benefits of incumbency are not what they used to be. Still, incumbents, especially those elected at earlier stages of realignment and polarization, do have significant advantages of name identification and fundraising, and by definition are good fits (or at least once were good fits) for their districts.

The impact of candidate quality on state legislative elections is harder to discern. It is still clearly true that candidates who work hard, raise money, and have compelling biographies and issue priorities do well in legislative elections, but the interplay with these factors and the partisan fundamentals of a district are complex and difficult to predict with certainty. Every election cycle, thousands of candidates work harder than their opponents and lose anyway—because their districts were carefully constructed so that losing was inevitable. Elections aren't math problems, and, even if they were, "compelling biographies" are not a quantifiable metric that can be entered into a formula or algorithm.

At higher levels of the ballot, the way to understand which candidates have the ability to under-perform or over-perform their partisan metrics or how constituents feel about a particular issue is to use polling. The challenges inherent in all polling in the modern era, however, are magnified at the state legislative level. If a pollster has a difficult time constructing a representative sample of the Commonwealth of Pennsylvania, how much more difficult is it for 1/204th of the Commonwealth?

This is not to say that there is no use for polling in state legislative districts. On the contrary—polling is still the essential tool we have to understand what messages are resonating and which ones are not. However, un-contextualized polling is a lousy way to determine the state legislative battleground. If there is a poll with a surprising topline result, it is much likelier that the poll is wrong than that an unexpected district is in play.

Voter Decision Making

Once chamber and race decisions have been made, the nextlevel of decision making where analytics and data comes into play is deciding which individual voters to target, and with what messages. For individual legislators and their campaigns, this is the most important level of decision making and the one they have the most control over, but for institutions with a larger focus, it is often the most easily overlooked.

1 The average absolute error of DPI vs actual results was 3.35% across targeted chambers and districts, lower than any other projection dataset we had access to.

2 **nytimes.com/2014/06/12/upshot/polarization-is-dividing-american-society-not-just-politics.html**

Unlike statewide or Congressional campaigns, most state legislative campaigns have a single voter contact universe—often constructed to be every voter except the least likely to turn out and the most committed partisans of the opposing party. The most sophisticated campaigns may have different levels of tiering for canvass contacts, mail, digital, phone, text, or other forms of voter contact, but very few distinguish communication streams between persuasion, turnout, and rolloff voters or have issue—or constituency-specific persuasion universes. The districts and budgets are simply too small to allow for this differentiation and too few voters have a strong sense of who the candidates are for those micro-universes to be communicated in a cost-effective manner.

This presents a challenge for analytics and message testing, since narrowcasting messages is often not a realistic option. Campaigns need to identify enough voters to win and find a message that broadly works for all of them. This often has the effect of pushing campaigns to relatively bland messages. If messaging is motivating to base voters but risks a backlash among cross-pressured potential ticket splitters, those messages may be too risky to gamble on.

Policy Decision Making

Once legislators have been elected, data and analytics can play a role in helping legislators understand their constituents. Constituent polling has the same challenges that electoral polling has. However, the small size of state legislative districts and the difficulties inherent in all public opinion research in this era mean that traditional surveys can struggle to give legislators an accurate picture of what their constituents think about the issues in front of the legislature.

One major advantage to serving in elected office at this level, however, is that constituents are often eager to engage personally with their legislators. Most citizens think that their statewide and federal elected officials are too far removed from their lives to engage with them directly, but there is an enthusiasm to engage on a human level with state legislators. People will come to the door when canvassed, they will join telephone town halls, and they will come to public meetings to meet their legislators.

For the purposes of understanding the views of the constituency, however, this is a double-edged sword. As anyone who has attended a community meeting knows, the people who self-select to give their opinion do not necessarily speak for the majority. It can be challenging to know whether vocal citizens speak for a majority or just for themselves without rigorous analysis.

Big Picture Recommendations

Analytics, polling, modeling, data, technologies, and tools intersect with every part of the work of legislators and the organizations that support them. Because there are so many different kinds of questions that analytics can be asked to weigh in on, it is difficult to give a simple answer to the question of what analytics investments make sense. This document is an attempt to lay out concrete recommendations along a whole range of analytics use cases, from race tiering through data warehousing, but before we get into specifics it's worth focusing on a few key themes that will run through all of the more specific recommendations.

- National organizations that are focused on the state legislative level of the ballot benefit when they work with state and local organizations whenever possible to incorporate valuable on-the-ground knowledge in their district-level targeting decisions.

- Hard-side campaigns and committees often fail to do enough to communicate priorities and key campaign information.
- There are lots of data sources available for free or for affordable costs (national partisan and ideological models, historic indices and results, data exchanges, etc.) that perform well at predicting outcomes and that organizations do not leverage as effectively as they could.
- Existing state polling, modeling, and research consortia could better serve the needs of hard-side campaign users and other national groups.

Tiering Challenges and Recommendations

One of the fundamental challenges of anyone engaging in state legislative work is the sheer scale of it. It would be impossible for anyone, or any organization, to understand every state legislative district in America, much less be able to do anything to have an impact. Tiering chambers and races is absolutely fundamental and can be incredibly challenging.

Identifying Chamber Opportunities

A variety of factors—partisan realignment on education, an overall decline in ticket splitting, increased geographic ideological self-sorting, and especially partisan gerrymandering—has led to fewer state legislative chambers that are competitive between Republicans and Democrats. Non-partisan handicappers from the University of Virginia rated just 10 chambers as potentially competitive going into the 2022 elections, compared to 15 in 2020 and 18 in 2018[3], and that was in a national post-redistricting cycle, which historically has seen the greatest turnover. National organizations whose primary goal is investing in competitive chambers, therefore, have fewer opportunities than ever before, which makes seizing those opportunities more urgent than ever before. National organizations whose primary goals are policy outcomes may have other standards, of course, since their policy goals may cross partisan lines.

For those organizations that do prioritize competitiveness, establishing an initial battleground usually isn't rocket science, especially if it's not a post-redistricting cycle. Previous legislative election results provide a tremendous amount of predictive power, and statewide results at the legislative district level add additional context and are sometimes publicly available[4]. Expert non-partisan handicappers like the Cook Political Report, UVA's Center for Politics, and others can add additional context.

The challenge for national organizations that prioritize investing in competitive chambers, however, is how to update their targeting as the election cycle develops. Initial target lists can and must change, as candidate recruitment, primary elections, fundraising, and political environments change. It can be especially difficult to identify late-breaking challenges. One example that was cited several times in our research was the case of Oregon in 2022. The Oregon House wasn't perceived to be particularly competitive at the beginning of the cycle, with UVACfP rating it "Likely Democratic", but national

3 https://centerforpolitics.org/crystalball/articles/the-battle-for-the-state-legislatures/

4 https://www.dailykos.com/stories/2013/07/09/1220127/-Daily-Kos-Elections-2012-election-results-by-congressional-and-legislative-districts

Republicans targeted it aggressively[5] and Democrats responded in kind. Democrats held their majority, but by a margin of just 3,069 votes over five districts.[6]

Understanding in real time how seriously to take late-breaking shifts is extremely challenging. That's true for all political work, but it's substantially more difficult at the state legislative level than it is for Congressional, Senate, or Gubernatorial campaigns, which feature dramatically more public polling and public projections. State legislative races do not enjoy recent high-quality district-specific polling in every conceivable battleground district.

The most effective solution to these challenges is a detailed legislative projection dashboard, described in detail later in this section. There are lower-tech solutions, though, like benchmarking statewide polling to state legislative districts. To continue the Oregon example, the median State House district was about 1% more Republican in both 2016 and 2020 than the state as a whole when looking at statewide results. Hillary Clinton got 54.85% of the two-way vote in the median House district in 2016 while getting 56.16% of the statewide two-way vote. Joe Biden got 57.35% of the two-way vote in the median House district in 2020, while getting 58.31% of the statewide two-way vote. It was logical to assume, then, that if the statewide political environment was neutral that the Democratic majorities would be at risk, and a neutral-to-Republican-leaning statewide environment is exactly what polls found in Oregon starting in October[7], leading to national Democrats to spend money in what ended up being competitive districts.[8]

Everyone struggles to understand state legislative battlegrounds.

With 7,386 state legislators in 6,815 districts in the country, any organization that is national in scope will have a difficult time understanding the makeup and details of the legislative playing field. While state legislative races are becoming more nationalized, there is still tremendous value to understanding the history, demographics, and nuance of a district in a way anyone not very close to the ground will struggle with.

Recommendation: Work with in-state entities to gain an understanding of the local political environment to help inform district-level targeting decisions.

Wherever possible, national organizations should reference in-state partners, whether that is a state-based research consortium, a caucus, an independent expenditure table, or local civic groups. When possible, national organizations should support that work with data, expertise, and funding.

Most organizations in the space strongly prefer this approach, relying heavily on in-state organizations, like caucuses and local independent expenditure tables, to help inform district-level targeting. In-state organizations have important local knowledge that needs to be considered before a national entity gets involved in order to be actually helpful.

The one caveat we would add to this is that sometimes in-state entities can get emotionally attached to districts that are not actually as competitive as they wish they were. This is particularly true in states where elected officials personally play a major role in determining the battleground. Rural districts that used to support moderate Democrats and suburban districts that used to support moderate Republicans may not do either any longer, but it can be challenging to update a mental map if it was drawn at an earlier point in

5 https://www.rslc.gop/press-releases/rslc-upgrades-four-democrat-trifecta-states-to-opportunities-to-flip-chambersnbsp

6 https://sos.oregon.gov/elections/Pages/electionhistory.aspx

7 https://projects.fivethirtyeight.com/polls/governor/2022/oregon/

8 https://dlcc.org/press/breaking-democrats-defend-oregon-legislature-despite-an-onslaught-of-gop-spending/

the ongoing realignment. The role of national organizations should be to ask smart questions and make sure that decisions are being made with a strong data foundation.

Recommendation: Hard-side campaigns and committees benefit when they do more to communicate priorities and key campaign information.

The most effective campaigns regularly collect and share (to the fullest extent that state laws allow) key information that independent-side entities need for their tiering decision. This data can include:

- Fundraising information
- Self, opposition, and issue research books
- High resolution pictures of candidate and opponent
- Regularly summarized press clips on candidate bios, issues, and current issue positions
- Voter contact ID data

These fundamental pieces of information provide key insight into districts as well as how well a candidate "fits" in their district. In the absence of data, it can be all too easy for organizations to bring out-dated or stereotypical ideas of candidate "fit", be they race or age or gender or ideology. With performance metrics and these other pieces of information, organizations can leverage their own personal expertise and priorities to more accurately assess districts and candidates.

In addition, voter contact ID data can be leveraged in multiple ways to help inform and assess what a likely electoral outcome may be. First, and the most common use, is using voter contact information to assess whether voter contact efforts are providing the desired results—education persuasion, mobilization, turnout, etc.

Challenge: Identifying key districts is an ongoing process, not a one-time event. Districts need to be prioritized for candidate recruitment, then evaluated for early investment once the candidates on all sides are clear, and then prioritized for late money once the race is engaged.

Knowing at the end of October of an election year which state legislative districts are the most competitive is relatively easy. Identifying the districts that will become competitive the year before, when candidate recruitment needs to begin, especially in a post-redistricting year, is much more challenging. On both sides, candidate quality makes a real difference in electoral outcomes at the state legislative level, but groups that want to recruit their preferred candidates find challenges in understanding the potential battleground early in the election cycle.

Recommendation: Fundamental tools and tactics are still powerful and can be relied on for decision making if these fundamentals are brought into the modern age and done right.

For this initial step, and for many steps beyond, fundamental district information—such as demographics, geographic information, and just *knowing* a district and the people in it—is and will always be critical to understanding a district.

In terms of predicting how competitive a state legislative district will be, previous election results should be the first data collected and computed to come up with a performance metric. These performance metrics are durable, based on publicly available data, and can be easily understood across a large number of audiences—potential candidates, volunteers, managers, and funders. In addition, these metrics are easily comparable across districts within a state as well as *between states*.

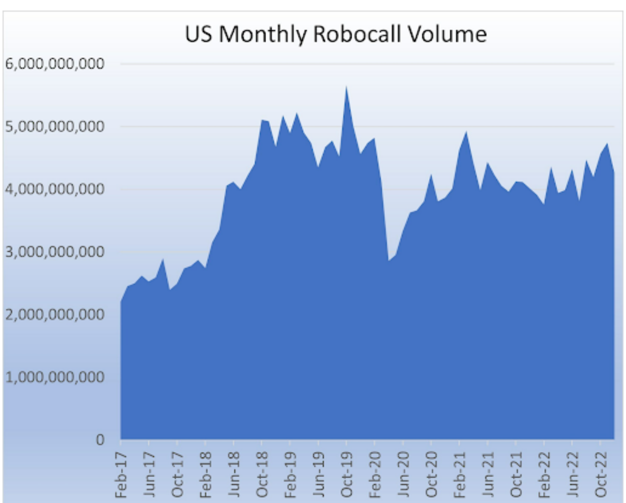
It is possible to compute custom performance metrics, of course, but it is easy to make mistakes. District lines change, but so do the underlying precincts where results are calculated. Not all early and mail-in votes are assigned to geographic precincts at all. Strong independent candidates and atypical election systems, like ranked-choice voting and top-two or top-four general elections—or a combination of both such as in Alaska—further complicate matters.

It can also be challenging to choose elections that accurately reflect underlying partisanship. Especially strong, or especially weak, candidates can distort indices that rely heavily on their performance. Lower-profile races that draw less spending are often better proxies for partisanship than top-of-the-ticket contests. It's also important in the era of political realignment to choose recent races—as college educated voters trend Democratic, and non-college voters trend Republican, previous election results are trailing indicators and can get quickly out of date.

The easiest way to avoid these pitfalls is to use a proven index. In our research, the single most accurate predictor of state legislative election results was the Democratic Performance Index (DPI) produced by the National Committee for an Effective Congress (NCEC).

Surprisingly, despite its utility, fundamental data is not widely known and used by in-state actors to prioritize among districts. We spoke with caucus executive directors who had never heard of NCEC data, and did not realize that people who specialize in this work exist. Early campaign tiering can be improved tremendously by setting standards and providing assistance for custom index creation or by licensing and syndicating a tested index.

Polling Challenges and Recommendations



Polling is an irreplaceable tool for decision making around public opinion, even as conducting polling has become more difficult for a variety of reasons. Some of these issues have been around for a long time or were predicted to become issues before the advent of current day technologies. Writing in 2003, journalist E.J. Dionne and Brookings Institute fellow Thomas Mann wrote:

"Declining response rates, emerging technologies, and early voting are posing yet more obstacles for even the most responsible of pollsters."[9]

9 https://www.brookings.edu/articles/polling-public-opinion-the-good-the-bad-and-the-ugly/

Challenges facing public opinion research include, but are not limited to:

- Potential respondents not answering the phone
  - Call centers used for public opinion research often call from a phone number that a poll recipient is unfamiliar with, leading to decreased likelihood to answer the poll per a report from Pew[10]
  - While the report indicates that people are picking up the phone for unknown numbers less frequently, the reasons are less well studied
- The explosion in scam robocalls and texts
  - Scam robocalls saw a slight decline during the pandemic but have gone back to pre-pandemic levels per YouMail, a leading anti-robocall software provider that tracks robocall usage[11]
  - These numbers are often from unknown numbers which may be a reason why individuals are not picking up the phone
- A decline in social trust and increase in social anxiety over phone use[12]
  - With fewer phone calls, familiarity with how to conduct a phone call with a stranger is decreasing and leading to more social anxiety over how to conduct a phone call with a stranger
- And many other reasons[13]

For the average resident of the U.S., these problems are easily managed. Texting, voice messages, social media, and video calling are becoming more common for the average individual.

But for public opinion researchers, these individual-level changes in attitudes and behavior snowball into large difficulties. From a statistical perspective, these changes in respondent attitude and behavior may not have as large of an impact at the national or statewide level due to the larger sample pool of respondents. However, the impact of these challenges on the statistical methods that fuel polling are magnified at the legislative district level due to the small size of these districts. In other words, at the state legislative district level there are fewer people to call than a statewide election and finding someone who will actually stay on the phone is difficult.

This can mean that:

- Generally, fielding a poll both takes longer, may be less reliable, and the poll can be more expensive than a similar poll conducted 10 years ago;
- For members of a state legislature, there may be concerns about whether the results of a poll accurately reflect the mood or policy preferences of constituents in their district, region, or state.

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10 https://www.pewresearch.org/short-reads/2020/12/14/most-americans-dont-answer-cellphone-calls-from-unknown-numbers/

11 https://www.prnewswire.com/news-releases/robocalls-top-50-3-billion-in-2022--matching-2021-call-volumes-despite-enforcement-efforts-301714297.html

12 https://www.thecut.com/article/psychologists-explain-your-phone-anxiety.html

13 https://www.nytimes.com/interactive/2022/10/24/opinion/frustrated-with-polling-pollsters-are-too.html

- For caucuses, the cost and timing concerns of individual campaigns are magnified, and their decision timelines need to adjust accordingly;
- For organizations, there are also concerns about whether polling is providing an accurate look at the overall legislative and issue landscape, in addition to the increased time and costs to poll;

These problems exist across the landscape of public opinion research[14] and must be addressed in a variety of ways—what polls are used for, how polls are conducted, and the expectations of the poll consumer.

Broad Challenges Across All Types of Polling

A recent Pew Research in-depth analysis of changes in the polling industry[15] examines how public opinion polling methods have changed since 2000. These changes have been broad and sweeping both due to changes in technology and changes with how individuals are responding to polls. Some of these changes include:

- Changing poll design
- Fewer live phone interviews
- More online or text-based polling
- Newer methodologies to create the polling sample
- Uncertainty whether changes are producing more accurate results
- Increasing costs
- Decreasing reliability of phone numbers
- Response bias
- Non-response bias

These are not the only challenges that public opinion polls face. The Pew Research study focused solely on national polls due to resource constraints and the uncertainty of whether their analysis at the state level could be done. Based on our conversations with pollsters, these limitations and additional factors exist, and are often more challenging, at the statewide, regional, and state legislative as well.

Unfortunately, the scope of the Pew Research report did not include an analysis of why these changes were happening and primarily focused on what was happening. However, the report does state:

> *"...design decisions often reflect a multitude of factors. Survey cost—especially the increasing cost of live phone polling—came up repeatedly. Timing can also be a factor, as a design like address-based sampling can take weeks or even months to field."*

14 https://www.pewresearch.org/short-reads/2022/09/21/does-public-opinion-polling-about-issues-still-work/

15 https://www.pewresearch.org/methods/2023/04/19/how-public-polling-has-changed-in-the-21st-century/

Below, we will address the challenges that were highlighted through the course of our research and help provide partial context around the question of why these changes may be seen and how they are impacting polling that is important at the state legislative level.

Challenge: The size of state legislative districts combined with lower contact rates and contact fatigue for polling has made public opinion polling at the state legislative level more difficult, longer to conduct, more expensive, and possibly less reliable.

Sample Size Concerns

At the state legislative district level, polling faces several challenges due to the smaller population size especially when compared to statewide or congressional polls.

For most congressional or smaller district general election polling purposes, a polling sample size of 400 respondents is considered by the majority of individuals we spoke with to be the bare minimum sample size needed in order to get both:

- A representative sample of voters overall
- A representative sample of voters large enough to provide strategic insight into the electorate when looking at sub-samples.

Based on our professional experience and conversations with individuals at polling firms, getting a large enough sample has become harder due to multiple factors. In 2019, the **Pew Research Center issued a report**[16] on these issues in polling including but not limited to:

- Declining response rates
- Declining quality of phone numbers
- Non-response bias
- Increased costs of reaching individuals due to the above factors

To be clear, these issues, the issues listed above in the Pew Research report, and others not listed are having a large impact on public opinion research across the board. And per the Pew Report, the research is unclear on whether changes made by public opinion pollsters are actually solving the problems that have been laid out.

The impacts of these changes and their solutions are amplified at the state legislative district level due to the smaller pool constituents that can be contacted.

For example, using a response rate of 1 respondent for every 100 contacts attempted, a pollster will need an estimated 40,000 contact attempts in order to meet a sample size of 400. In many legislative districts, this sample size can be greater than the total number of adult constituents, registered voters, or

16 https://www.pewresearch.org/short-reads/2019/02/27/response-rates-in-telephone-surveys-have-resumed-their-decline/

likely voters with phone numbers in a given legislative district. This leads to additional rounds of contact attempts needed and in turn increases costs of polling that are passed on to the polling firm client that is interested in research at the state legislative level.

Conducting polls online and through text messaging can help, but only on the margins. Most established online survey panels are too small and too broadly distributed to provide more than a handful of responses in a legislative district. Text message surveys can be an important addition, particularly with younger voters, but they also feature low response rates and high levels of respondent dropoff.

Poll Respondent Fatigue in a Crowded Environment

With the rise of robocall technology, phone and text scams, and increasing preference for communication via text message or other modes outside of phone calls, public opinion polling respondents are increasingly wary and tired of being contacted.

In addition to the overall contact challenges listed above, fatigue also leads to fewer respondents going all the way through a poll—leading to the need of more rounds of calling—or respondents going through the motions of answering poll questions without giving their true opinion (ex. a respondent repeatedly saying they are very concerned about an issue just to get through a poll).

There is also a partisan non-response component to this—studies have shown that Republican campaigns and organizations rely more on late-cycle text messages and phone calls than Democrats, so voters IDed as likely Republicans may be more exhausted by this communication, driving differential partisan non-response (see footnotes for more details on response and non-response bias).[17] [18]

Challenge: Electoral strategy at the state legislative level may not need tracking polls due to budget, messaging, or timing constraints.

Tracking polls are relied on by many campaigns to help determine effectiveness of campaign strategy in the final weeks before Election Day. From testing efficacy of paid media to assessing the public opinion environment after a major change in the dynamics of a race, these short, close-to-the-election tracking polls provide critical insight for many campaigns.

At the state legislative level however, many of the individuals we spoke with said that tracking polls provide little helpful strategic information for decision making when conducted between 21 and 35 days prior to election day. Based on our interviews with caucus directors, consultants, and organizations interested in legislative elections, these campaigns often need to talk with almost all voters except their opponents' base with one messaging track in order to persuade, educate, and turnout enough voters to win. In addition, for

17 https://www.nbcnews.com/data-graphics/15-billion-political-text-messages-sent-2022-rcna64017

18 Authors' note: Response bias can take many forms. In the context of public opinion polling, this can take the form of poll respondents' providing answers that conform with various types of social norms. This could be a respondent answering that they are more likely to vote because that is a perceived social 'good' or being more likely to answer a survey due to in-group pressure such as within one side of a policy position or a political party. These individuals and their responses are then over-represented in a poll. Non-response bias may also occur wherein individuals in a poll sample self-select out of a poll due to a variety of reasons (poll fatigue being a common reason) and lead to under-representation of these individuals in the poll. Both issues impact the overall results in the poll. A broad consensus exists that these types of bias were part of the issue of polling errors in the 2016 and 2020 elections per the Pew Research report.

More on response bias can be found in this article by research firm Qualtrics: https://www.qualtrics.com/experience-management/research/response-bias/

most races, the messaging strategy will not change unless there is a major, campaign-defining moment in the races such as a major scandal occurring, and the definition of a “major scandal” that can break through crowded election season message environments has changed dramatically.

Recommendations for All States

These recommendations in this section are ones that should be considered by those interested in work in all states. These recommendations focus on ways to increase polling efficiencies and how polls of all varieties are analyzed.

Recommendation: Leverage regional issue messaging polls combined with shorter district polls to create efficiencies in costs for key research questions.

Benchmark polling—long, detailed, early-campaign polling with extensive questions about priorities and messaging—has been a hallmark of modern public opinion research. They ask questions about an individual’s opinions, attitudes, beliefs, and actions about a multitude of issues to drive understanding of the public writ large.

However, based on the challenges listed above that are faced in public opinion research broadly and in state legislative districts specifically, how public opinion research is conducted needs to change.

For groups of legislators working together, or for outside organizations wanting to get involved in understanding public opinion, regional issues and messaging polling should be leveraged first to get a broad understanding of how different constituencies or audiences across a state or an area of a state are thinking about an issue. For the research consumer, this regionally based research can be used to better understand how different geographic regions or demographic segments of the state are responding to key issues or policy proposals. This regional research can also guide future research statewide or in smaller geographies by limiting the scope of issues or policies if the findings from the regional polling are clear.

Next, with regional or state-wide research available, polling at the district-level should become more focused and shorter. Based on our conversations for this project, this may manifest in different ways depending on the audience, the state, or a variety of factors that may change how polling is approached in a specific state. Focusing in on these key issues and making polls shorter can also make the polls more cost-effective and possibly more accurate due to reduced drop-off.

For timing and implementation, we recommend consulting with in-state organizations and actors, consultants, and in-state research consortia to develop shared best practices that can be shared.

Recommendation: Update expectations for how polling is used at the state legislative level, both for those who commission polling and those who consume it.

The changes to how polling is approached and considered at the state legislative district level listed above are significant, and the expectations of those who commission and consume polling should change accordingly. Polls are conducted to help campaigns and organizations determine strategy, but they’re also conducted to prove to allies and partners and funders that a race is competitive and deserves investment. We believe that campaigns and organizations would benefit from approaching polling with a less rigid, more flexible approach, as would allies and partners and funders.

The expectation of many modern state legislative campaigns is that they conduct a benchmark poll after the primary or in early summer and then conduct one or more tracking polls at some point after in September or October. That framework is outdated for many campaigns, and all too often the only reason campaigns attempt to make it work is to appease national funding organizations.

Making polling cheaper or more effective in small geographies is next to impossible given market forces. But polling research consumers can change their internal decision making processes to be less reliant on tracking polls. Public and internal Issue polling, chamber-specific forecasts, campaign finance data, statewide or regional generic polling, and other research tools can be used to better help understand the state of the race in later months of the campaign, especially by those making resource allocation decisions. Organizations can become more comfortable making decisions with other and older sets of data, or commission and fund the trackers themselves.

As stated previously, creative and message testing can be effectively used by campaigns and caucuses to ensure the right creative and messages are deployed in paid media, earned media, and field programs.

Recommendation: Provide documentation and/or training to polling consumers at the state legislative level to help them understand what a reputable poll will look like, how to interpret both public and internal polling, and become a better consumer of polling.

Based on our research and the Pew Research report linked above, polling is getting more complicated every day. Between new modes of polling, emerging polling methodologies, changes to poll and sample design, and the explosion in the number of public opinion polls conducted, keeping up with what is happening in the world of polling is hard even for people who are knowledgeable consumers. For those who have limited experience with polling, knowing what all of these changes mean, what a “gold standard” public pollster is, or why the sponsor of a poll matters may seem insurmountable.

Where possible, we would also recommend developing training resources around the changing landscape of polling.

Recommendation: In-state research consortia developed in the past decade provide innovative, efficient ways to understand public opinion in a district, region, or state.

In the past decade, the development of subscription-based in-state research consortia have been critical to policy and electoral successes in several states like Iowa, Wisconsin, Michigan, Minnesota, and Pennsylvania. By pooling resources from multiple organizations, these consortia are able to provide resources such as:

- Candidate polling at the state or regional level
- Issue polling at the state or regional level
- State-based modeling such as issue- or candidate-support or turnout models
- Qualitative research such as focus groups, journaling, or social listening

This research can help guide thinking by national organizations, in-state organizations, caucuses, and electeds to better understand the individuals at the state legislative district level or to guide future research.

However, this research *cannot* fully replace polling or other private research. The needs and priorities of research consortia are often not solely focused on individual districts or issues specific to one region of a state due to the statewide nature of their work.

In addition, research consortia in these states face the same challenges that public polling does across the board in the U.S. Response/Non-response bias, developing a representative polling sample, and all the broader challenges that have been listed are still challenges that research consortia face.

While they have their limitations, these research consortia are critical pieces of in-state infrastructure that are able to conduct the research or other data/analytics products that individual organizations may not be able to do themselves. With increased funding and support, we do believe that these consortia could fill research gaps at the district level.

In addition, these consortia have begun to collaborate with each other. This collaboration could possibly create best practices across consortia, multi-state research projects, or support for an emerging state consortium. If questions or practices across these consortia become standardized, the results of polling across consortia could also result in a way to compare results across states.

This kind of collaboration could also serve as a way for other states to learn more about what policies and messaging around policy is working in other states with communities similar to their own. For example, what messaging is working around minimum wage increases in other states and how could that apply to a minimum wage increase proposal in a legislator's own state.

Creating and funding long-term support for research consortia in states where they do not currently exist should be a priority especially for legislative sessions and the 2024 and 2026 elections.

Modeling Challenges and Recommendations

The advent of Big Data in the 2000s precipitated explosive growth in the development and use of data and analytics tools in electoral politics. Predictive modeling of individual voters, randomized controlled tests of campaign tactics, and forecasting election outcomes have become foundational tools when running any campaign—from President to State Assembly.

These tools—along with public opinion polling that saw explosive growth in the 1980s[19] and have since become industry standard—can provide numerous benefits to campaigns, elected officials, organizations, and funders.

- For a campaign, a benchmark poll and a set of turnout and support models provide the key information on what messages to send to which set of voters
- For elected officials, these tools can help them understand the issues impacting their communities and the solutions that might best serve those communities
- For organizations, these tools can help provide insight into how to talk to the communities they serve and drive decision making
- For funders, a poll or a projection can guide their thinking around campaigns, organizations, or strategies to invest in

19 Traugott, Michael, Glenn Bolger, Darren W. Davis, Charles Franklin, Robert M. Groves, Paul J. Lavrakas, Mark S. Mellman, Philip Meyer, Kristen Olson, J. Ann Selzer, and Chris Wlezien. 2009." An Evaluation of the Methodology of the 2008 Pre-Election Primary Polls." AAPOR AdHoc Committee on the 2008 Presidential Polling.

While these data products continue to be leveraged for a multitude of purposes, these models can sometimes be over-prescribed as a solution to the questions and challenges faced.

Challenge: Modeling designed for national and statewide uses can be hard to adapt to state legislative contexts.

Alongside the growth, expansion, and experimentation of these tools, other challenges have come to the forefront that limit how these tools can be effectively leveraged. Many of these are similar to the challenges listed above in regards to polling.

- Fewer individuals answer their phones, leading to concerns about how representative samples are of the larger population
- Lower name ID, low understanding of the role of a state legislator, and decreased electoral saliency down ballot can lead to respondents thinking more about the national environment than a specific candidate, region, or issue

While these challenges have certainly impacted work at the national and statewide level, the impacts of these challenges grow exponentially in smaller geographies such as state legislative districts.

In order to be effective moving forward, the specific challenges discussed below regarding data-focused research must be addressed in terms of how data is collected, conducted, interpreted, and consumed.

Challenge: Predictive modeling at the individual level has significant limitations for persuasion or education campaigns within state legislative districts.

Predictive modeling of individual beliefs and behaviors changed the voter contact industry when these models became widely available for use in the mid-2000s. Campaigns, committees, and other organizations moved from largely using precinct-based data to target and communicate with voters to using individual-based data. This led to increased efficiencies in both persuasion and turnout communication as individuals who would likely be non-responsive to treatment were excised from voter contact plans on the doors, in the mail, and on the phones.

In other words, instead of knocking 60,000 doors one time throughout the course of the election, 20,000 doors could be knocked three times because the models said that the other 40,000 doors were bad targets because those individuals were either already supportive or against the candidate or that they were not going to vote.

At the national, statewide, or congressional level, this targeting is incredibly important and impactful especially with multiple positive or negative message tracks. If Group A cares about jobs and the economy while Group B cares about healthcare, each group would get a different message tailored to them specifically.

Recommendation: Advocacy and electoral campaigns at the state legislative level need to communicate broadly, and should think of modeling as a tool to remove the least-likely people to support them.

Campaigns focused on state legislative districts often need to communicate with almost everyone in their districts. Generally, we recommend removing only voters with extremely low turnout scores and people who are committed partisans in the opposite party.

Campaigns at this level need to do three distinct things—increase name ID with base voters to combat ballot roll-off, persuasion to swing voters, and to drive turnout among voters likely to support them but uncertain to turn out. Targeted messages to these separate audiences, however, often do not make sense strategically or financially. Direct mail and digital campaigns get prohibitively expensive on a per-voter basis when universes get overly precise, which drives campaigns to try and communicate one broad message to every audience. That choice, in turn, requires broad targeting.

Creative and Message Testing

Several forms of statistical testing have been increasingly widespread since the advent of Big Data. Randomized controlled tests (RCTs) have provided exceptional insight into voter behavior, strategies, and tactics—scripts for phone calls and door conversations, how to leverage peer-to-peer texting, and social pressure mail that can increase turnout.

What is Online Creative and Message Testing?

Online creative and message testing is another form of testing and has become increasingly widespread, in commercial as well as electoral and advocacy contexts. Using online panels, recruited participants are shown text, pictures, or video messages or creative pieces and then asked questions about those messages.

These tests can provide a snapshot in time of how an audience and its sub-groups respond to text messages, static creative such as pieces of mail, memes, or banner ads, or moving creative such as video or motion graphics. This research can help:

- Determine how audiences respond attitudinally or behaviorally to messages or pieces of creative
- Take a deeper look into subgroups of audiences to see which messages or creative should be delivered and those that should not
- Assess audience trust in the messenger of a piece of creative
- See how audiences would react if a policy proposal were implemented
- Check biases of political professionals in creative and messaging vs. the target audience[20]

This type of testing is being used across multiple industries including public health,[21] e-commerce,[22] telecommunications, and health care.[23]

While RCTs can provide insight as well, they generally have a longer runway, taking months. The runway for deployment and results of online creative and message testing can range from days to 2–3 weeks. This timing piece is especially helpful when there are tight deadlines and the focus is more on a message than the impacts of a policy or a tactic.

20 **https://osf.io/8un6a/** This recent preprint by Broockman and Kalla suggests that messaging and creative professionals may be bad at predicting message efficacy and recommends message testing in order to evaluate messaging and creative.

21 **https://journals.sagepub.com/doi/10.1177/1524500416628527**

22 **https://userinput.io/customer-research/message-testing/**

23 **https://hbr.org/2020/10/marketers-underuse-ad-experiments-thats-a-big-mistake**

Message and creative testing can be helpful, but they will never be able to completely replace benchmark polls, focus groups, or other research tools. However, these tools can provide key information to campaigns, caucuses, organizations, and elected officials especially when there are time and budget constraints and when a tracking poll would not significantly change the trajectory of a candidate or issue campaign.

Broad Challenges in Testing

Much like polling and modeling, the positive aspects of creative and message testing come with challenges in measurement as well. Many of these challenges were laid out in a 2020 article in the *Journal of Marketing* and that are distilled here:[24]

- Despite the availability and granularity of large amounts of data and immense amounts of testing, a testing environment may still not adequately represent reality as even the best online creative and message tests primarily occur in an artificial environment
- Online creative and message testing panels often recruit individuals through existing pools of panelists that may not be representative of the audience that is attempting to be reached
- Testing requires a holdout sample that does not receive a piece of creative or a message. Using that holdout sample in a randomized controlled test may mean that key parts of an audience are not receiving a message.

While this may paint a dire picture of how to test messages and pieces of creative, the reality is that these issues are part and parcel of any statistical analysis of audience behaviors, opinions, beliefs, and attitudes. These issues affect all industries conducting this type of research and often in different ways based on the campaign.

Creative and message testing can be incredibly useful, but these types of tests require large population sizes in order to get large enough sample sizes to actually conduct these tests. Most singular legislative districts and even collections of specific types of legislative districts (urban/suburban/exurban, agricultural industry driven v. service industry driven, open seat v. incumbent, etc.) within a state are not big enough to get the sample sizes required to statistically power such tests.

One solution to powering these tests would be to combine districts with similar qualities or traits in multiple states to get enough statistical power for these tests. However, coordinating these tests across multiple states may be difficult due to differing laws between states as well as the lack of knowledge about the interests or needs of potential cross-state partners.

In addition, creative and message testing takes planning and financial resources that those commissioning a test may find daunting. While the simplest of tests involving simple text may be in the $2,000–$5,000 range, tests that involve multiple pieces of video creative can range from $10,000–$30,000 for just one set of tests.

24 https://journals.sagepub.com/doi/10.1177/0022242920913236
https://hbr.org/2020/10/marketers-underuse-ad-experiments-thats-a-big-mistake
https://www.forbes.com/sites/paultalbot/2021/06/13/marketers-enter-a-new-era-of-creative-testing/?sh=4c8f8fb97b5d

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Staffing Challenges and Recommendations

Throughout the course of our interviews, we learned that there are significant knowledge and staffing gaps amongst groups and organizations that engage with state legislatures. These knowledge and staffing gaps include:

- The data available to them to assist in decision making in terms of historic partisan indices (see above in Tiering section)
- What predictive models are potentially available for use on available voter files
- Understanding the human resources available to them to support their data work needs; through partner organizations
- Knowing what other data and analytics products and services that could potentially be available outside of their immediate ecosystem
- Staff, consultants, or advisors that could support them with the other points

Based on our interviews, these gaps are caused by a few major factors including: lack of time, lack of education, and conflicting priorities.

Challenge: The importance of data and analytics is well understood. However, due to resource challenges or administrative challenges, most individuals we spoke with do not have enough capacity to focus on data-related challenges without support. Legislative caucus directors, campaign managers, and others at smaller organizations know the importance of data and analytics. But their plates are so full with their primary roles that there is often not enough time in the day to focus on data-related challenges.

Working with legislative leadership, managing budgets and cash flow, raising money, developing strategy, talking with candidates, meeting with consultants—these are just a few of the tasks that a legislative caucus director does during the average day. State legislators and their staff already have to understand many policies, how their chamber works, and what is going on day-to-day with their constituents. Understandably, researching the latest analytics tools, tests, and keeping up-to-date with the latest in data and analytics falls to , implementing empirically-tested best practices, and knowing who to ask to get a new model turned on in the voter file can often fall to the bottom of the to-do list.

Challenge: Individuals simply do not know where to go or who to ask about complicated data or analytics problems, questions, or solutions.

With the explosion in data, data vendors, analytics vendors, message testers, voter management software, texting tools, and many more tools, knowing who to talk to or ask about data-related or data-adjacent issues is almost impossible for any one person.

This is especially true for state-based individuals and organizations when many of the people who can help with the issue at hand live outside their state. They may have a colleague, friend, or consultant who can help connect them but often that is the exception, not the rule.

Challenge: The data and analytics issues that are important to state legislative caucuses are often not top priorities to the state parties the caucuses rely on for access to the voter file and other data and analytics resources because the state party has different priorities.

Different individuals and groups in a state party often have different needs and priorities. To be clear, that is not the fault of anyone—just an acknowledgement of the hard decisions that many people make on a regular basis.

These differences arise to being an issue when the flow of information about updated models, target audiences from different groups, or other key pieces of information about the overall data and analytics in-state environment is stopped. This lack of support and sharing can lead to inefficiencies in programs, decreased trust between caucus and state party, and possibly losses in close districts that would otherwise be winnable.

Recommendation: Create documentation that provides a foundation of knowledge for how to understand the modern data and analytics toolbox: polls, predictive modeling, creative testing, voter files, and other data tools and what questions to ask about these tools.

State legislators and those that they work with, their official side staff, caucus directors, and legislative campaign managers already have so much on their plates between all of the work they need to do.—legislating, fundraising, negotiating, running programs, and so much more. They are expected to know at least something about everything and there rarely is enough time to know it all—especially the world of tools that use Big Data to help their work.

Creating helpful documents or memos that can provide a basic and shared understanding about these tools would help fill an educational gap that currently exists around these products.

Documentation should, but is not limited to:

- Provide a fundamental explanation for what these tools are that can be understood by anyone, not just data and analytics experts
- How these products are built and what questions to ask about their creation and application
- Explaining the different use cases for each of these different tools

These documents should be regularly updated every two years, or more frequently, as the technology and tools landscapes are rapidly changing.

Longer Term Thinking

Through the course of interviewing individuals for this project, one theme emerged outside of those directly pertaining to the data and analytics landscape and coalesced: the importance of long-term planning at the state legislative level.

When we began asking about why different components of a data and analytics strategy worked or did not, the difference often began with talking about either the existence of a long-term roadmap and buy-in from in-state organizations—or the lack of such a plan.

These plans did not necessarily mean flipping chamber control, breaking a supermajority, or passing landmark legislation. Instead, these plans meant that multiple entities had agreed to a long-term framework and plan and were regularly working towards those goals. When something did not work, these entities worked to review and update that plan.

These long-term roadmaps created two outcomes that heavily impact the data and analytics/landscape—staff retention and preparation for redistricting.

This shared framework also allowed for long-term planning into redistricting. In the near past, redistricting only occurred in most places after the decennial U.S. Census. However, due to gerrymandering, legal challenges, and changes to interpretations of the law, mid-decade redistricting is happening more often. However, having a long-term plan that anticipated these challenges helped these in-state entities and individuals be prepared to address those mid-decade redistricting challenges.

Recommendation: Retaining State Legislative Talent and Institutional Knowledge through Long-term Strategic Planning

From individuals we spoke with, a long-term shared framework and roadmap created an environment where staff were more likely to stay working in the state legislative world—on the official side or electoral side.

For many individuals, they see their roles within the state legislative world as a stepping stone into roles statewide, federally, or at the national level. The job may be fine for a cycle but after that they want to move on. This was due to several factors—lack of long-term planning and investment, salary and benefits, or that their role only existed for legislative session or the election cycle.

Because of this high turnover, often time plans for the future were only created for the next session or cycle. Then, because those plans were only for the next session or cycle, long-term investment in staffing retention was not taken into account. And these cycles repeat unless there is some kind of intervention.

The intervention that was needed for staff retention were these long-term strategic plans. The individuals we spoke with felt that because there was a plan that they could invest in, then they felt there was more certainty about their role, the work they were doing, and that there was something bigger that they were working towards.

Because these individuals were also invested in the long-term success of the roadmap, the institutions and organizations they serve also benefited. This staffing retention meant that:

- Institutional knowledge around policies, strategies, tactics, networks, and more was retained and did not need to be relearned on a regular basis
- Long-term relationships were formed through various networks that could lead to longer and stronger collaborations
- Continuity of implementation of the long-term roadmap was not interrupted, leading to greater successes
- Lower budgetary costs for hiring and training staff

We know that in many of these states these long-term strategic plans exist and do not intend to say there should necessarily be any changes.

Appendix I: Methodology

To conduct the landscape analysis of data and analytics for the State Democracy Action Fund (SDAF), we took a qualitative, interview-focused approach.

Step 1: Developing a Questionnaire and a List of Interviewees

To start, we sat down with staff at the SDAF to better understand their needs, the desired outcomes, and our general approach. We also discussed key SDAF stakeholders we would need to interview and provided other individuals and types of individuals we would want to interview.

We generally divided interview subjects into the following categories:

- National Organizations
- Party Committees
- State Legislative Caucus Directors
- In-State Organizations
- In-State Research Consortiums
- Academic Researchers
- Pollsters
- Political Media Consultants
- Thought Leaders
- Data & Analytics Consultants & Vendors

From there, we worked with the SDAF to develop a questionnaire to use in the process of our interviews.

Step 2: Conducting Interviews

From May through August of 2023, we interviewed over 50 individuals across the landscape about how data and analytics is leveraged at the state legislative level. These interviews took place primarily over online video conferencing and each was scheduled over 90 minutes

Throughout these interviews, one of us generally served as the primary lead on the call while the other person took notes of the calls. After each call, we scheduled time to debrief.

In terms of priority, we started with national level organizations to better understand the landscape of data analytics at their level but also to get an initial grasp of how data and analytics are being used at the state level.

We then prioritized speaking with in-state organizations, caucuses, research consortiums, and others based in states. These individuals are on the frontlines of working with legislators and candidates for the state legislature every day—they are decision makers at the state level. We knew that their lived experiences would be critical to understanding and framing the challenges faced at this level and provide the bedrock for the recommendations below.

From there we began talking with thought leaders, consultants, pollsters, and academics to learn more about challenges they see in data and analytics at the state legislative level—and what innovations in the space could help solve these challenges.

Step 3: Synthesizing Information

Throughout the course of this research, we regularly met to synthesize what we had learned into the challenges and recommendations outlined below. Due to the nature of data and analytics being used primarily as tools for official legislative and electoral work, we found that structuring our thoughts around the different approaches used by each tool to be the best framework for our thinking and this report. For example, polling and modeling are similar in terms of data collection, however, each is constructed and used differently enough that they should be treated as distinct areas of interest.

About the Authors

John Hagner

John Hagner has spent more than twenty years working at the intersection of politics and data. He was part of the national field and coordinated campaign team at the DNC in 2004, before helping lay the groundwork for the first national voter file. He was a statewide field director, targeting director, and coordinated campaign director in Ohio before returning to D.C. to work as the first National Targeting Director at the Democratic Congressional Campaign Committee, alongside Sam, in 2010. He served as the National Field Director and Analytics Director at the Democratic Senatorial Campaign Committee before becoming a partner at Clarity Campaign Labs, a Democratic analytics and modeling firm, from 2013 to 2021. At Clarity, his clients included the DCCC, the DSCC, the Democratic Governors Association, EMILY's List, Planned Parenthood, the Equality Federation, and campaigns and ballot initiatives across the country, as well as political parties in the UK and the European Union. He's trained on data management and analytics across the US, Africa, and Central Europe.

He currently lives in Minneapolis with his partner.

Sam Nitz

Sam is the driving force behind Asgard Strategies & Analytics, combining over fifteen years of experience in message strategy, targeting, and delivering effective programs at all levels of the ballot.

His first role was as a field organizer in a Wisconsin State Assembly race in 2004 where he first learned about voter targeting and polling. From there, he worked at a small polling firm and at Petel & Company, a direct mail firm.In 2010, Sam joined John as Deputy Targeting Director at the Democratic Congressional Campaign Committee.

From 2011 to 2017, Sam served as the first Director of Targeting and Analytics at EMILY's List where he supported both the Campaigns Department and WOMEN VOTE!, their independent expenditure arm, in making data-driven decisions.From 2014 through 2017, he also served as the Deputy Independent Expenditure Director of WOMEN VOTE! In that role in 2016, Sam ran one of the largest and most cutting-edge digital media expenditures at that time to engage and turnout Millennial women. This work combined traditional video advertising with sponsored content, celebrity-driven ads, and testing at every step of the way.

Sam's strategic and analytics advice has informed decision-making at every level of the ballot—from school board and state legislatures to Governor and President—and in state houses across the country, working to make voting more accessible and more secure.

Sam has trained hundreds of operatives across the country in messaging and analytics strategy including for such organizations as the League of Conservation Voters, NDI, Lillian's List, EMILY's List, the DCCC, and the New Organizing Institute. In 2022, Sam received GAINPower's Inaugural Powerful Idea award for his work to make a spot at the table for data and analytics staff.

A proud native of Janesville, Wisconsin, Sam and his husband Ben live in Washington, D.C. with their dog, Buddy.

Authors' Note

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