Transforming White Light into Rainbows: Segmentation Strategies for Successful School Tax Elections

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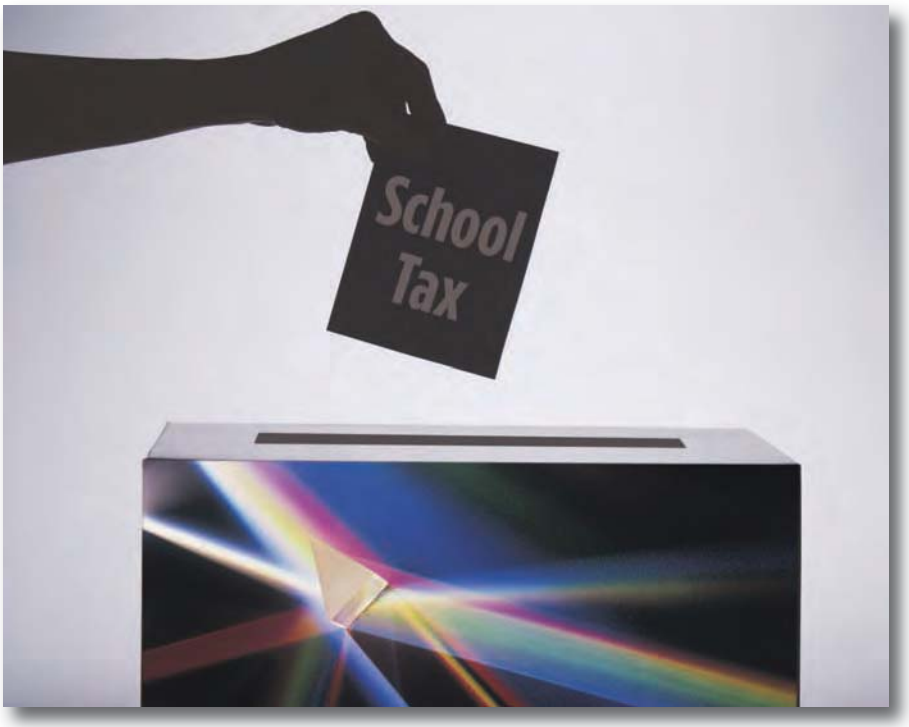

In the late 1600s, British physicist Sir Isaac Newton first demonstrated refraction and dispersion in a triangular prism. He discovered that a prism could decompose white light into a spectrum. Translation? Hold a prism up to the light at the correct angle and white light magically splits into vivid colors of the rainbow!

So what do prisms and rainbows have to do with winning school tax elections? More than you think.

The science of preparing for a school tax election begins with the development of an annotated voter file, which is the raw material that serves as the campaign's foundation. In the context of elections, the individual registered voter is the white light of Newton's experiment. File annotation is the process of merging other public and purchased databases and electronically "marking" segments or characteristics of the underlying registered voter file. Once this process has been completed, the full complement of annotations serves as an electoral prism, allowing the campaign to achieve a rainbow of segmentation coding.

In a well-planned and executed tax election, these resulting data are the campaign's most important resource in voter surveys, canvassing, communications, and get-out-the-vote efforts. How far to probe the colors of the rainbow in segmentation coding and microtargeting is a strategy decision with cost and precision implications.

Colors of the Rainbow

The amount of information in a voter file varies significantly from state to state. At a minimum, a voter file includes the name and residential address of the voters in the school district, as well as some information about how often each has voted in the past. In most states, the voter file also includes information about voters' ages and when they first registered to vote.

Building on this foundation, we identify gender according to the first name of each voter (which works well except for gender-neutral names like Pat) and ethnicity, if relevant, based on his or her last name. Finally, in most school referenda, the name and residential address are matched with school district data to identify parents.

Residential addresses can also be used to gather a great deal more information for the voter file by matching addresses in the registered voter file with commercially available databases. These can include homeowner status (renters vs. owners), length at residence, individual and household income, and education level. Depending on the ballot issue, files can be annotated according to characteristics, such as hunting or fishing licenses, donation history, or membership in community groups.

The most sophisticated level of final annotation is the coding of each household by its demographic and lifestyle characteristics. A number of these file segmentation systems are available. The one we have applied to the art and science of winning school finance elections assigns each household to 1 of 66 different demographic groups. It allows us to code a file so that voters can be assigned to 1 of 14 social groups and to 1 of 11 life stage groups.

All this may sound Orwellian, but it serves a very simple purpose as a school district prepares for an operating or facility referendum. When combined with the results of a scientific random sample survey, all the annotations added to a voter file allow for the development of more sophisticated data analyses with regard to measuring public opinion of subgroups and more precise targeting within the voting population.

More importantly, microtargets can be developed within those voter target groups, allowing for very focused communications and voter contact in support of the ballot proposal.

A Case Study

An example will help illustrate how we can apply these tools. Recently, one of our school district clients was preparing to place a general obligation bond on the ballot. Because it was a California client, the proposal had to win at least a 55% majority on election day.

The district presented two specific challenges: (1) it was a large district with a voting population of 88,000 and (2) it was a high school district, serving only the families of students in grades 9 through 12. As such, it had no way to identify elementary and middle school parents in the voter file even though those parents would vote in the referendum.

To address these challenges, we had the file annotated with consumer information and information from the file segmentation system. As part of the effort to develop an initial target structure for a bond campaign, we also had the voter files of three other districts fully annotated. Those districts had been on the ballot previously. Each had won voter approval for a general obligation bond. For each, the results of an extensive telephone canvass of the voting population by the citizens' campaign launched in support of the district's proposal were available, as was information concerning who actually participated in the election.

Each of those previous elections allowed us to drill down into the annotations added to the file to identify the demographic characteristics that most successfully predicted participation *and* support for the school proposal on election day. Within the file segmentation system annotation, we were able to identify three very important groups: (1) the parent population, (2) the population of voters whose children had all graduated but were still apparently very willing to support a school tax proposal, and, most importantly, (3) the segment of

this population that seemed unwilling to support any proposal the district might place on the ballot.

By deconstructing these earlier elections, the citizens' committee could build a target structure for the high school district's bond campaign. Using the results of two scientific surveys, these targets were tested and refined.

Finally, the citizens campaigning in support of the bond were ready to send out their first piece of direct mail. Instead of facing the prospect of a mailing to 88,000 voters, they prepared to contact 27,000 targeted households. After this mailing, they began a telephone canvass of these voters. The results of the first two nights of calling allowed us to use the commercial annotations in the file to further refine the target population and reduce the size and cost of campaign mailings. The end result? A resounding 68% win.

Research to Practice

The opening stanza in Lagaya Evans's poem "The Rainbow" is,

The rainbow of colors
So merry and bright
Each color has a purpose
Even black and white.

It is the third line—"Each color has a purpose"—that reinforces the vital importance of effective voter file development at the foundation of school tax election planning.

In the context of school tax elections, having a purpose is manifested through the process of expanding and annotating the registered voter file. The data can later be separated into a rainbow of segmentation coding to support the key functions of the campaign: surveying, canvassing, communicating, and getting out the vote.

Going forward, conducting these campaign activities at a high level will be essential as baby boomers get older and the percentage of registered voters with school-age children continues to shrink.

Like Sir Isaac Newton, school leaders will need to use campaign prisms to separate voters into demographic groups. Once that has been accomplished, support for the proposal can be measured and the likelihood of different demographic groups participating in the referendum can be determined. These essential steps provide the foundation for effective microtargeting, communications, getting out the vote, and a winning campaign.

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