



BLUEPRINT

Blueprint: Our Methodology

March 2020

Overview and Guiding Principles

Swing Left's mission is to build a lasting culture of grassroots participation in winning elections on the Left by making it easy for anyone to maximize their impact on the races that matter most.

To prepare for the 2020 elections, Swing Left launched Blueprint, a values-based donation tool that gives donors what they need most: trusted targeting that cuts through the noise; a portfolio that contains candidates and organizations for both short- and long-term progress; recommendations that respond to personal preferences and the needs of the electoral calendar; and meaningful and respectful communications.

Blueprint's strategy is grounded in a few guiding principles:

We support Democrats to create a better democracy. In recent years, Republican governments have enacted a broad anti-democratic agenda, with policies ranging from voter suppression laws that disenfranchise voters of color to racial and partisan gerrymandering that minimizes Democratic representation. In light of these anti-democratic practices, electing Democratic majorities is the best and only means we have to strengthen the democratic process.

We invest to move the needle. Political giving on the left is lopsided: 50% of candidate donations are spent on races won or lost by over ten points, 45% is spent too late to make a meaningful difference, and the highly visible, safe candidates who need donations the least end up receiving the most. Our approach is different. We've assessed the entire political landscape, identified the elections and organizations where a marginal dollar will go the furthest at each stage of the electoral cycle, and built Blueprint to direct donations strategically.

We work with both candidates and organizations to win elections in the short term and build voter power in the long term. To realize a better government, we must help Democratic candidates win elections *and* empower communities to exercise their voice and their vote. Our two-pronged strategy invests in both elections and infrastructure-building organizations. In the following sections, we'll walk through how we define our scope, select funding recipients, and assess our impact in each area.

Investments to help Democrats win elections and majorities

Our Strategy

In determining how to focus dollars raised for candidates, we defined Blueprint's scope in three ways: level of the ballot, type of political funding, and type of election.

Level of the ballot: We target the political battlegrounds where electing Democrats will have the greatest impact on our democracy. In the 2020 cycle, we are focusing on the presidency, the Senate, and state legislatures, based on their potential for nationwide impact on our democracy and their competitiveness.¹

Blueprint places a significant emphasis on funding state legislative candidates. Historically, Democrats running for state legislature in the most critical swing states have suffered from massive funding gaps compared to GOP candidates. With redistricting set to begin after the 2020 elections, investing in Democrats at the state level is critical to ensuring fair legislative and Congressional districts in 2021.

Type of political funding: Broadly speaking, political dollars are either on the “hard side” (directly coordinated with candidates) or the “soft side” (not coordinated with candidates, better known as “independent expenditure”). Blueprint operates on the hard side, directly working with and raising money for candidates. This approach is cost-effective (with candidates benefiting from lower ad rates than independent expenditure groups), it is a strategic way to “bundle” many contributions under the campaign finance limit, and it helps campaigns hire field staff and build and scale smart programs on the ground.

Per state campaign finance laws, we are required to raise money into state-specific funds. For that reason, Blueprint directs dollars to candidates through a series of ActBlue funds, including U.S. Senate nominee funds, two Flippable States Fund (Federal and Non-Federal), and state-specific Flippable funds.²

Type of election: Blueprint’s focus is squarely on helping Democratic nominees win the general election. We stay out of primaries to avoid putting our thumb on the scale of highly localized elections, and to ensure that candidate contributions made through Blueprint are spent against the GOP, not other Democrats.

Our Targets

Our goal is to drive dollars to where they will have the greatest marginal impact on electoral outcomes. This requires analyzing three factors:

- **Competitiveness:** What is the expected Democratic vote share and probability of winning?
- **Cost:** Given “cost per vote” curves and current spend on both sides, what is the marginal impact of a dollar invested in this race?
- **Impact:** How does winning a given race affect the overall balance of power in a chamber?

¹ For example, maintaining a Democratic majority in the U.S. House is critical to strengthening our democracy—but the Democratic majority is unlikely to be threatened in 2020. As a result, we have chosen not to focus heavily on U.S. House races this cycle, though we will track as the Democratic primary continues in the event that the Democratic majority is threatened.

² ActBlue is an online fundraising platform that has helped donors contribute billions of dollars to progressive candidates and causes since 2004.

At the presidential and Senate levels, we use state-by-state data to identify swing states where a dollar will go furthest in netting 270 Electoral College votes and forging a path to a Senate majority. Key targets include:

	Presidency		Senate	
Most likely battlegrounds	Arizona Florida Michigan	North Carolina Pennsylvania Wisconsin	Arizona Colorado Georgia	Iowa Maine North Carolina
States and races to watch	Georgia	Texas	Alaska Kansas Michigan	Montana Texas

At the state legislative level, the sheer number of elections (about 6,000 in 2020) makes these calculations more complicated. Using data from Deck Apps on incumbency, demographics, previous electoral results, and polling, we generate and regularly update probabilistic forecasts of the competitiveness of all state legislative seats in the country. These are aggregated into chamber-level forecasts, which help us determine not just where we can win seats, but where there is real potential to shift the balance of power in a given legislature (e.g., breaking or preventing GOP supermajorities, winning or maintaining Democratic majorities).³

We combine these competitiveness metrics with an assessment of the impact of flipping a state chamber.⁴ Among competitive targets, our model prioritizes states that will influence the Congressional redistricting process in 2021, states with a history of voter suppression, and states with large populations. These targets align with the 10 gerrymandering states included in Swing Left's [Super State Strategy](#):

Win Democratic majorities	Prevent or break GOP supermajorities	Weaken GOP majorities
<ul style="list-style-type: none"> • Arizona state Senate, House • Florida state House • Iowa state House • Michigan state House • Pennsylvania state Senate, House • North Carolina state Senate, House • Texas state House 	<ul style="list-style-type: none"> • Wisconsin state Senate, House • Ohio state House 	<ul style="list-style-type: none"> • Florida state Senate • Georgia state Senate, House • Iowa state Senate • Ohio state Senate • Texas state Senate

³ This informs the most important question: Democrats' ability to shift the balance of power among state chambers and executive offices. For example, we may prioritize states where we have the opportunity to gain a Democratic trifecta (as Swing Left and Flippable did in 2019 in Virginia) or to break a Republican trifecta (as Flippable did in 2018 in Wisconsin and Michigan). Where Democratic governors face heavily Republican legislatures, we may prioritize preventing Republican supermajorities in those chambers to maintain the governor's veto power against regressive policies and unfair voting maps.

⁴ Converting electoral gains into predicted policy changes, and then estimating the value of those policy changes, is necessarily subjective. For this reason, Blueprint's recommended portfolio focuses on ensuring a fair, inclusive democracy at all levels of government—what we consider to be the bottom line. Donors can surface specific values or goals in requesting a custom portfolio, and our team will use those inputs to tailor a unique Blueprint.

After determining which legislative chambers and races to target, we use return-on-investment (ROI) modeling to select the specific targets where we can move the needle at the lowest cost. The Blueprint ROI model integrates the research, data, and meta-analysis of leaders in the political modeling space, including probabilistic forecasts from Deck Apps; cost-effectiveness curves of different campaign tactics by election type from Analyst Institute; relative CPP (cost per point) of state media markets from SQUAD; demographic information from the U.S. Census; campaign finance information from the FEC; field and budget reports from individual campaigns and state caucuses; and qualitative inputs from partners in the field.

Our ability to bring together these variables for all races, and to aggregate them at the chamber level, allows us to compare the cost-effectiveness of different types of races. For example, we can compare the ROI of investing to flip a Senate seat against that of flipping the state Senate to break a Republican trifecta. Critically, this methodology takes into account up-to-date spending on these races, helping us exclude races that are so saturated with spending that a marginal dollar is ineffective—and instead prioritize low-cost, high impact races where a marginal dollar will have a significant impact on voter turnout.⁵

Investments in organizations that register, protect, and mobilize voters

Our Strategy

Our candidate investments ensure that high-quality Democratic candidates have the resources they need to win elections. But beyond candidates, we need to maximize the number of eligible voters and invest in a well-informed, energized electorate. This in turn requires a flexible funding strategy that includes 501(c)(3) and 501(c)(4) organizations that run year-round programs to serve voters and communities.

There are thousands of organizations working to strengthen democratic infrastructure by improving voter turnout, safeguarding our elections from misinformation, and building tech and digital tools to support candidates and campaigns. This entire network of organizations is critical to Democratic wins. To determine where we should focus for Blueprint, we considered the impact, efficacy, cost-effectiveness, and need for funding across different tactics and theories of change. This landscape analysis led us to zero in on the following areas:

Voter registration: Turnout in elections is typically measured as a percentage of registered voters that vote. In a high-visibility, contentious Presidential election like this year's, turnout is expected to reach 90%. But this figure doesn't capture the elephant in the room: a staggering 33.1% of voting-eligible adults across the United States are unregistered. Registering voters—and, in particular, doing so in targeted geographies and communities that are likely to vote Democratic—is the most effective use of donor dollars in a high-turnout election cycle.

⁵ In aggregate, this information informs our broader geographic strategy across both electoral and organizational selection. We can zero in on overlapping geographies where voters in a specific district may influence several important elections (this is the underpinning of Swing Left's Super State strategy). Alternatively, we can identify more "under-the-radar" opportunities where a marginal dollar might have an outsized impact on a race. For example, in states that are not considered presidential battlegrounds, there may be opportunities to achieve key down-ballot wins (breaking or preventing a Republican supermajority, making progress toward or achieving a Democratic majority) at a lower cost.

Voter protection: Even when voters are registered, a wide variety of GOP-fueled voter suppression tactics may keep them from voting, from ID laws to voter purges to polling place closures to election day misinformation. Voter protection efforts build the infrastructure both to pursue sustainable changes to voting policy and to respond in real time to instances of voter suppression. While these efforts are typically housed within campaign structures and state parties, new organizations formed to focus entirely on voter protection are now bolstering traditional campaign-led efforts.

Voter mobilization and turnout: While campaigns invest heavily in turning out voters, some of the most effective mobilization and turnout efforts are housed within 501(c)(4) organizations that have built long-standing, authentic relationships with communities around the issues that matter most to them. Investments in effective—but often significantly under-resourced—community organizations are a necessary complement to electoral efforts, and have the potential to drive up turnout in targeted geographies that are critical to victories up and down the ballot.

Our Targets

In identifying high-quality organizations within an expansive field, we first zeroed in on a set of geographies, then conducted due diligence based on tactics employed and organizational health metrics.

Identifying key geographies

Swing Left's Super State Strategy has identified twelve states that are battlegrounds for two or more major contests (presidential, Senate, and/or state legislature). Among these states, we have zeroed in on eight that feature both (1) close statewide margins in 2016 and/or 2018, and (2) particularly low registration rates, and where targeted registration and organizing efforts have the potential to close projected margins. These states are:

Voter registration, protection, and mobilization targets

Arizona	North Carolina	Florida	Pennsylvania
Georgia	Texas	Michigan	Wisconsin

Sourcing and diligencing organizations

After aligning on our geographic targeting, we sourced and diligenced organizations based on the criteria below. To develop this set of recommendations, we engaged directly with organizations and other leaders in the political funding space.

Funds for our selected civic organizations are raised into the Blueprint Organizational Fund, a 501(c)(4) funding vehicle hosted by our fiscal sponsor, Tides Advocacy.

Criteria	Description
Scale	<ul style="list-style-type: none"> Running one of the top five most scaled (in terms of programmatic metrics) programs, while meeting other criteria
Programming history and cadence	<ul style="list-style-type: none"> Completed at least one cycle of programming Implementing year-round programming Programming aligns with peer-reviewed tactics⁶
Strategic clarity and track record of impact	<ul style="list-style-type: none"> Well-articulated intended impact, theory of change, and success metrics Year-over-year improvement upon metrics Strong performance compared to relevant benchmarks
Rooted in communities, collaborative	<ul style="list-style-type: none"> Clear definition of target constituencies; priority given to communities of color and young people Staff reflective of organization's key constituency Locally led, culturally informed programs Coordination with local and national partners that avoids duplication of resources
Robust leadership and team	<ul style="list-style-type: none"> Visionary leadership Investment in managers and staff development Healthy organizational culture Responsible fiscal stewardship
Funding need	<ul style="list-style-type: none"> Clear articulation of needs and costs Need for and ability to absorb Blueprint funding based on prior funds committed, funds on hand, and funds required to close budget gaps Hiring (or investment) roadmap considers different funding scenarios

From investment strategy to product strategy

Our aim in building Blueprint was to create a new standard for political giving. Donors should expect their dollars to be spent as strategically as possible. They should have the tools at their fingertips to make highly effective contributions with ease. And at the end of the day, they should receive feedback as to the impact they made. We translated these imperatives into a set of product features designed to transform the political donation experience—for the better.

⁶ Voter registration tactics vary based on state laws, registration gaps, and local challenges of engaging hard-to-reach voters. For that reason, organizations supported through Blueprint pursue some combination of site-based voter registration, online voter registration, and voter registration by mail. Voter protection tactics include local and state advocacy to expand access to voting, litigation, direct actions in response to real-time voter suppression, and earned media resources when advocacy and litigation are unsuccessful, or need a boost of public support. Voter mobilization tactics also vary, but adhere to best practices validated by the Analyst Institute.

A portfolio approach

With hundreds of critical races on the ballot in 2020, and still more organizations that are deserving of funding, it can be difficult and time-consuming to make a holistic strategy for political donations. By putting candidates and organizations together into a single Blueprint, we take the logistics and guesswork out of political giving.

The portfolio approach also allows us to “bundle” candidates and organizations based on a donor’s values and preferences. In addition to the standard set of Blueprints that we feature each quarter, we offer the option to create a personal Blueprint focused on type of recipient, geography, risk tolerance, issue preferences, and more.

Quarterly Blueprint updates

One of the hallmark features of Blueprint is our quarterly portfolio updates, which reflect the dynamism and changing needs of the electoral cycle. At the beginning of the year, our recommendations focus on voter registration and early funding to jump-start candidates’ campaigns. As the year progresses, Blueprint’s organizational allocation shifts from voter registration to protection, and the candidate allocation updates to incorporate new states and races as primary elections take place. Closer to Election Day, funding is focused on organizations leading voter turnout efforts along with late-stage support to the most competitive races.

These high-level allocation updates are made on a quarterly basis for two main reasons. First, candidates submit campaign finance reports on a quarterly schedule, so this allows us to adjust our candidate lists in tandem with those reports. Second, the primary schedule can be conveniently separated into three broad categories: Q1 states (Texas and North Carolina), Q2 states (Colorado, Georgia, Iowa, Maine, Pennsylvania), and Q3 states (Arizona, Michigan, Florida).⁷ This allows us to shift our targets and fill funding gaps at critical points throughout the election cycle.

Impact reporting

Alongside our quarterly updates, we also provide donors with quarterly reports on the impact of their donations, focusing on the following metrics:

Races

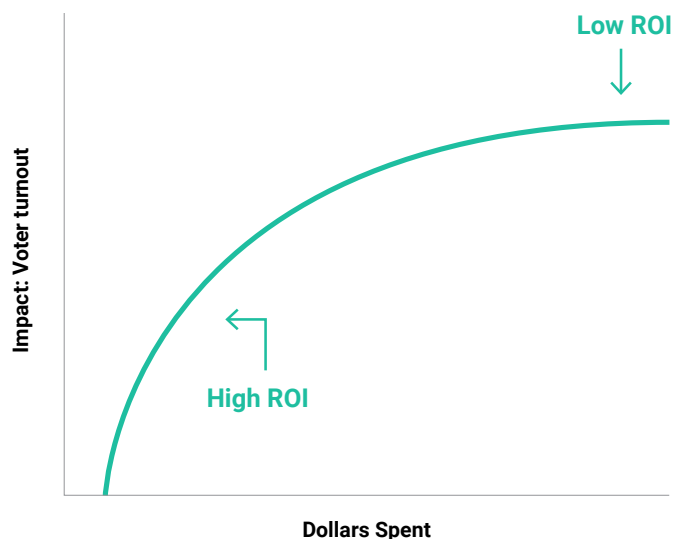
Many organizations tout their “win rate” as an indicator of success. Though it is important to win, this methodology is flawed: it’s easy to cherry-pick candidates who are safe bets, diverting resources away from truly competitive races.

In assessing Blueprint’s impact, we ask ourselves: have we maximized the impact of our donors’ contributions? In answering this question, we will look at the percentage of contribution volume directed to races that end up with a margin under 10 points, 5 points, and 2.5 points. This tells us whether we have pinpointed the most competitive races. In our work at Swing Left

⁷ Depending on the number of uncontested races in a particular state, Blueprint may raise funds for candidates prior to their state’s primary election date for the purpose of making earlier disbursements to candidates who are certain to be the official Democratic nominees. Pennsylvania is one such example.

and Flippable, we've directed over 90% of donor dollars to races won or lost by single-digit margins, and nearly two-thirds of dollars to races won or lost by less than 5 points.

To further understand the impact of dollars raised through Blueprint, we use our ROI model to estimate the voter-level impact of our contributions. This depends not only on how close or competitive a race was, but also on total raised for the race. We've worked with the Analyst Institute to estimate "VPK" curves, or votes per thousand dollars spent, based on the level of the ballot and tactic. By combining these VPK curves with fundraising totals and estimated campaign expenditures, we can estimate the impact of our investments on voter turnout in each of our targeted races.



Organizations

While it's difficult to assess the impact of a campaign investment until after Election Day, it's easier to track the impact of organizational investments over time. As part of our selection process, Blueprint-recommended organizations submit their cycle-level goals in terms of voter registration and turnout, as well as interim outputs (e.g., number of voter contact attempts made).

Through partnerships with both Blueprint organizations and national partners, we'll track progress to goals on each metric, as well as budgets and budget gaps. This dynamic approach allows us not just to report back on the impact of our donors' contributions, but to guide funds to programs where they're most needed at any given time.

Conclusion

Above all, our team is committed to delivering our donors—and our democracy—a winning investment strategy for 2020 and beyond. That means continually re-evaluating the data and decision-making behind Blueprint to ensure this methodology's continued efficacy and impact over time as new insights become available. As always, if you have any questions, concerns, or comments about Blueprint, please email us at blueprint@swingleft.org.