BLUEPRINT

Blueprint: Our Methodology

January 2023

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. In 2020, Swing Left launched Blueprint, a 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: 67% of ActBlue's 2019-2020 donations arrived in Q3 and Q4 and almost 50% of last cycle's federal candidate donations went to races won or lost by over ten points. This means many donations arrive too late in the cycle to make a meaningful difference, and the highly visible candidates who need donations the least often 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.

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Blueprint places an 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. Investing in Democrats at the state level is critical for advancing pro-democracy policies as well as impeding GOP-led attempts at voter suppression.

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 supports candidates exclusively on the hard side by directly working with and raising money for candidates' campaign committees. This allows us to capture cost efficiencies (as candidates benefit from lower ad rates), to bundle many contributions under the campaign finance limit, and to support campaigns as they 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. House and Senate nominee funds, and state-specific Swing Left funds.[1]

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?
- **Relative value:** Campaign contributions face diminishing marginal returns as the marginal cost per vote increases; among competitive races, where can we find relatively high value?
- **Impact:** How does winning a given race affect the overall balance of power in a chamber?

At the federal level, we use state-by-state and district-level data to identify states where a dollar will go furthest in forging a path to expanding the Senate majority and protecting the House majority.

At the state legislative level, the sheer number of races (over 6,000 in 2022) makes these calculations more complicated. In order to assess the competitiveness of legislative seats in our target chambers, we use probabilistic forecasts—provided by Deck Apps—based on incumbency, previous electoral results, and media data, combined with polling and up-to-date campaign finance data from candidates and political partners. These district-level analyses 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).[2]

We combine these competitiveness metrics with an assessment of the impact of flipping a state chamber.[3] Among competitive targets, our model prioritizes states with a history of voter suppression and gerrymandering and those with large populations.

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

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At the gubernatorial level, we evaluate race competitiveness based on the same quantitative factors we use for state legislative races. In addition to analyzing those inputs, we also consider targets based on the state's history of enacting anti-democratic policy—i.e., voter suppression and gerrymandering—and the strength of individual Democratic nominees.

After determining which legislative chambers and races to target, we use a return-on-investment (ROI) framework to select the specific targets where we can move the needle at the lowest cost. The Blueprint ROI framework 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 SQAD; demographic information from the U.S. Census; campaign finance information from the FEC and state campaign finance regulators; 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.[4]

Investments in organizations that engage voters and fight for fair maps

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, invest in an energized electorate, and advocate for voting maps that honor the "one person, one vote" principle. 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, building tech and digital tools to support candidates and campaigns, and fighting

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[2] 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/prevent a Republican trifecta. 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.

[3] 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 Blueprint, and our team will use those inputs to tailor a unique portfolio reflective of those priorities when possible.

[4] 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.

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gerrymandering during and after the redistricting process. 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 high-visibility presidential election years , turnout among the eligible voting population averages 60% and that number drops to 40% in midterm years.[5] 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—is among the most effective use of donor dollars in an election cycle.

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, and much more. The national and state-based ecosystem of voter protection organizations is increasingly robust and collaborative, and these efforts build the infrastructure to both pursue sustainable changes to voting policy and respond to voter suppression.

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 identifies states that are battlegrounds for two or more major contests (Senate, House, governorship, and/or state legislature). We target registration and organizing efforts in those states that have the potential to close projected margins in those competitive races.

Sourcing and diligencing organizations
After aligning on our geographic targeting, we source and diligence 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 Voter Fund and Blueprint Redistricting Fund, two 501(c)(4) funding vehicles hosted by our fiscal sponsor, Tides Advocacy.

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[5] Source: "Voter Turnout." FairVote. https://www.fairvote.org/voter_turnout#voter_turnout_101. Accessed October 3, 2021.

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Criteria	Description
Scale	• Running one of the top five most scaled (in terms of programmatic metrics) programs, while meeting other criteria
Programming history and cadence	• Completed at least one cycle of programming • Implementing year-round programming • Programming aligns with peer-reviewed tactics[6]
Strategic clarity and track record of impact	• 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	• 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	• Visionary leadership • Investment in managers and staff development • Healthy organizational culture • Responsible fiscal stewardship
Funding need	• 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.

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[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 voter engagement to overcome specific barriers to voting, 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. Redistricting advocacy employs a combination of public-led demonstrations, communications with elected officials, and lobby days.

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A portfolio approach

With hundreds of critical races on the ballot this cycle, 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 custom Blueprint focused on type of recipient, geography, issue preferences, and more.

Quarterly Blueprint updates

One of the hallmark features of Blueprint is our quarterly 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.

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 the 2020 cycle, we directed 83% of donor dollars to races won or lost by single-digit margins, and 51% of dollars to races won or lost by less than 5 points. In 2021, 88% of funds raised for Virginia candidates went to races decided by single-digit margins.

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[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. This is the case for Democratic incumbents at the Senate and gubernatorial level.

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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 for voter outreach 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). For organizations recommended for redistricting work, the window for assessing impact varies: organizations leading advocacy efforts submit outputs for that quarter while organizations pursuing litigation provide updates on their various legal challenges.

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 this cycle 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.

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