



# Final Report

**To:** New Venture Fund, Census Counts, Census Equity Fund

**From:** Sandi Fox, Smart As A Fox LLC

**Re:** Final Report on the Census Outreach Expansion Project

**Date:** March 1, 2021

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## I. Project Summary

The Census Outreach Expansion (COE) project was proposed in May 2020 to increase grassroots organizations' peer-to-peer texting outreach efforts and capacity building in the current COVID19 environment. This project allowed Census Counts partners and grantees to expand their ability to reach hard-to-count audiences in the 17 key states. By using an open-source P2P texting platform and combining resources for list acquisition we removed the middleman and brought down costs to a wholesale level. It also centralized texting efforts to streamline our outreach efficiently and prevented a duplication of efforts and unneeded excess costs. Many of these state and national grassroots groups were already looking at expensive peer-to-peer platforms and mobile list buying since in-person field organizing was no longer an option with the pandemic. COE helped groups to join forces to reach the maximum number of hard-to-count targets for our 2020 Census outreach.

*"I felt very strongly about improving the accuracy of the Census count, so it felt great to be helping with that. I also liked the fact that we were raising awareness of the importance of the Census, which is important. I had some very nice exchanges with people I texted, and I think I did succeed in convincing some reluctant people to participate."*

-Volunteer COE Texter

**We texted 9,401,115 hard-to-count targets in 17 states across the country.** Each target received between one and three text messages to ensure that they completed the U.S. Census. The COE Project sent a total of 23,231,733 initial text messages between July and September 2020.

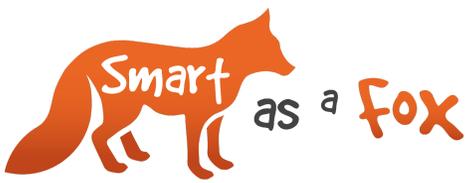
This memo outlines the project strategy, systems and processes, impact, participant feedback message performance, and lessons learned.

## II. Strategy

Our goal was to make sure that everyone was counted, especially hard-to-count audiences like people of color, immigrants, and children. With 96% of Americans owning a mobile phone we simply made the decision to meet people where they are, on their mobile devices. People of color also text more than their white counterparts, in fact the Black Community texts 2.24 times more than whites and the Latinx Community texts 1.56 times more than whites. So we met people where they were using their preferred method of communication.

Our messaging strategy to ensure that our hard-to-count targets responded to the census include:

- **Communicating with audiences in their preferred language.** We texted in both English and Spanish with the help of NALEO as a partner organization.
- **Personalization of messages** allowed us to communicate as both neighbors and a trusted source. We'll be identifying the sender by name and the organization they are texting from.



We will not however be using the targets first name, because this might come off as too “Big Brother” like and scare away targets.

- **Engage with a conversational tone** and ask questions to prompt a back-and-forth with target audiences about the census.
- **Used “Make A Plan” conversational tools** to help target audiences think ahead about when and how they would respond to the U.S. Census.

All of our targeted messages used one or several of these strategies in order to best influence our hard-to-count audiences to fill out the U.S. Census over a three month period.

### Centralized Infrastructure

By centralizing outreach infrastructure, strategy and data management we were able to avoid duplicitous and inefficient spending by coalition groups and contribute towards robust civic engagement capacity in the long term.

As noted, the centralization of infrastructure and resources for the COE Project offered state groups a free augmentation of their existing or planned P2P outreach. State groups were given the opportunity to continue to implement SMS campaigns with their own tools (Hustle, ThruText et al.) and they also benefited in participating in the coalition’s COE peer-to-peer outreach effort.

- **Centralization is more cost-effective.** At a minimum, Hustle costs ~ \$0.01/ message with a Movement Cooperative (TMC) contract. We paid less than half of that per message. That meant we were able to reach more contacts for less money in a centralized model.
- **Prevents the over-duplication of P2P messages.** In a centralized model, we were able to prevent duplicative messaging efforts to the same audience. Duplicative efforts can dampen effectiveness and is not a best practice. Overtexting has been shown to decrease P2P campaign efficacy.
- **Better data quality.** Because fewer people will manage the data, texting tools, and manual data governance between Spoke and the VAN, it is likely that the quality of the collected data by the end of the project will be better under the centralized model.
- **Messaging Best Practices.** Smart As A Fox and Resistance Labs have years of experience managing texting campaigns. Their expertise in texting content and strategy best practices were absorbed and retained by grassroots groups who participated in the COE Project. This expertise would have been absent if groups started texting on their own.

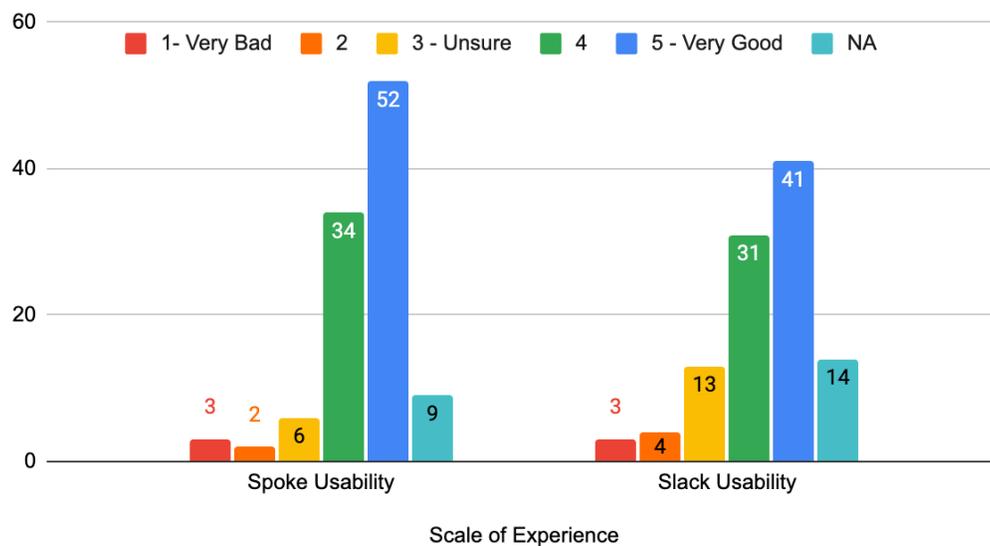


The infrastructure of this project is broken down into four areas: technology, data, management, and capacity. With help of Smart As A Fox (SAAF) and Resistance Labs (RL) these areas were completely covered.

## Technology

**SPOKE:** We partnered with Resistance Labs to use their ReWired version of Spoke, an open-source peer-to-peer platform originally developed by MoveOn.org and made available to progressive allies to build and expand upon. They also provided hosting via Amazon Web Services and wholesale message rates from their aggregator based on our unique needs for this project. Each state had their own Spoke “Organization” that held their campaign launches for each of the waves.

### Spoke and Slack Usability (Texter Feedback)



Texter experience with both Spoke was 81% “Good” or “Very Good” and for Slack was 68% “Good” or “Very Good.” There was a bit of a learning curve for some less technologically savvy and senior volunteers, but it was largely a positive experience with both platforms. With Spoke we ran into some glitches with the technology due to the volume of users and texts being sent (ex. screens freezing, or waiting time to receive texts), but those issues were troubleshoot and fixed.

**SLACK:** Resistance Labs have perfected a system of using Slack for volunteer & texter onboarding and management. They created a Slack Workspace for the COE Project, which they staffed to help with day-to-day texting campaign management and aid with any texter questions that arose.



**VAN:** Through our partnership with State Voices we were provided access to an isolated committee to house and manage our target hard-to-count data in the State Voices National VAN. This was completely free of charge. State Voices also offered its national data team's services for list maintenance and segmentation.

## Management

**Smart As A Fox (SAAF)** was responsible for project management, content and strategy development, timeline and evaluation. This included working with national partners on state lead recruitment, onboarding and grassroots participation. SAAF also led partner and vendor management by working closely with stakeholders, donors, partners, vendors, and participating organizations to keep the project on track and ensure buy-in. Throughout and upon completion of the project SAAF collected campaign performance data, as well as texter and participating organization feedback. The analysis from this data is presented in the report.

**Resistance Labs (RLs)** was responsible for day-to-day campaign management and texter support. They built the individual Spoke campaigns based on the state-by-state scripts SAAF drafted and received approval on. With the help of State Voices, RLs managed the target data in VAN, as well as list uploads and segmentation. RLs recruited texters (volunteer and paid) to send half of the text messages we sent. They also trained their own texters, as well as the texters recruited by participating organizations. With each COE message wave launch they provided texter support (technical & messaging). Lastly, they tracked the progress of each campaign's deliverability, filtration rates and other possible bugs.

## National Leads

For the purposes of this project we are primarily working with three national organizations: State Voices, NALEO, and the Leadership Conference on Civil and Human Rights. Each of these organizations served a specific role in our COE Project:

**State Voices** was the designated data lead. They housed our target audience data in an isolated committee in their VAN instance. They worked with us and Resistance Labs to create our segmented lists for each message wave. They also played a key role in promoting the project among their state tables and identifying State Leads in target states where they have a state table.

**NALEO** provided Spanish speaking texters to manage our Spanish speaking segment for each message wave. They also helped promote the project and recruit participating organizations from their grantees in our target states.



**Leadership Conference on Civil and Human Rights** is the designated lead organization for Census Counts and gave this project permission to use the Census Counts branding and name for the COE project. Leadership also helped us fill capacity needs by starting conversations with corporate partners who were interested in helping.

**The Census Digital Organizing Group (C-DOG)** also provided essential project support and coalition engagement, in addition to securing necessary resources to run the program.

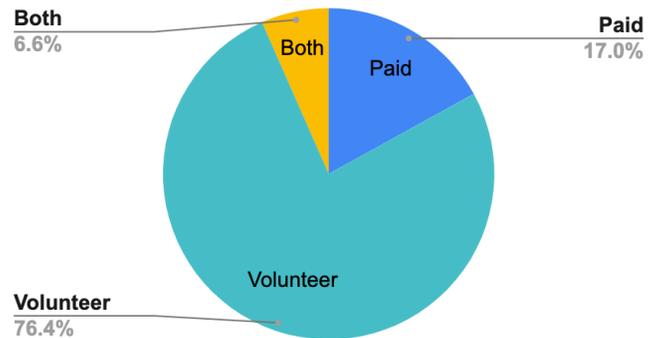
## Capacity

In order to send one message to almost 10 million hard-to-count targets we would need 120 staff/volunteers full-time (40 hrs) for a week. To meet the goals of this project we needed to ensure that we have enough staff and volunteers texting during each message wave “send window” or the determined period of time to get one message out to the full audience. As part of our contract with Resistance Labs, they recruited their own volunteer and paid texters to send 25 million texts.

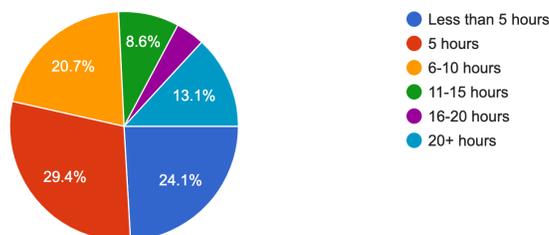
**We recruited over 1,400 texters from state, national and corporate partner organizations to help us send the other half of those messages.**

- Of those COE recruited to text 76% were volunteers, 17% were paid and 6.6% did a combination of paid and volunteer textings (2020 Texter Feedback Survey).
- Of the 1,075 who signed up directly through COE versus with partner organizations (ie. Verizon, etc.) a minimum of 8,690 texting hours were pledged, with a total of 8,975,595 messages sent by COE texters, which was 32% of the total texts sent.

Were you a paid or volunteer texter?



How many hours can you personally commit to texting every month over the course of 7-10 days? (Estimate)  
1,075 responses





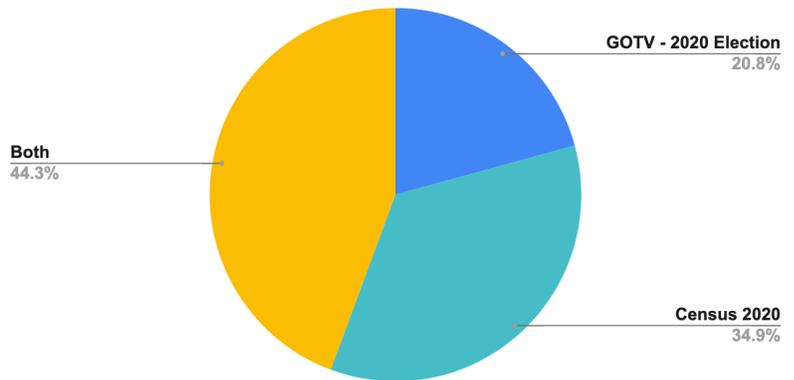
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Resistance Labs texters made up the difference, sending a total of 19,114,526 (68%) messages.

TEXTER CAPACITY		Participating Organizations				Resistance Labs			
Message	Total # of Messages Sent	# of Texters	Texts Sent	% Sent	# of SMS Sent/ Texter	# of Texters	Texts Sent	% Sent	# of SMS Sent/ Texter
Message #1	10,101,795	113	237,881	2.35%	2,105	1,758	9,863,914	97.65%	5,611
Message #2	8,566,434	608	4,309,361	50.31%	7,088	1,160	4,257,073	49.69%	3,670
Message #3	9,421,892	738	4,428,353	47.00%	6,000	1,558	4,993,539	53.00%	3,205
<b>TOTAL</b>	<b>28,090,121</b>	<b>1459</b>	<b>8,975,595</b>	<b>31.95%</b>	<b>15,193</b>	<b>4,476</b>	<b>19,114,526</b>	<b>68.05%</b>	<b>4,270</b>

The vast majority of the texts sent by our texters, 79.2% were for COE and 44.3% of them also helped send 501c3 GOTV text messages in October 2020.

What type of texts did you send this year with Spoke?

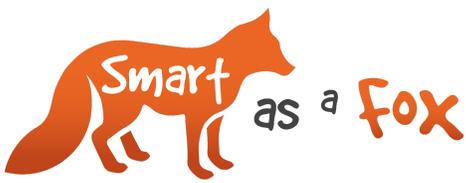


70.7% of our COE texters, both paid and unpaid had never sent peer-to-peer texts before. While 70.5% said they would definitely participate in a peer-to-peer texting campaign again, while 21.7% said they might.

## Data

By coordinating efforts on data management and procurement we were given the opportunity to significantly scale up peer-to-peer SMS capacity among coalition groups. We partnered with State Voices and other progressive 501c3 organizations to purchase millions of numbers in target states for 2020 Census outreach and get out the vote efforts. Pooling our resources to bring down overall costs allowed us to scale and reach a larger audience.

While mostly positive, the acquisition process was scattered and the timeline didn't coincide with our needs well. We had to work around that in order to ensure we had all our targeted universes in time to launch in July, by ad hoc adding new contacts at the beginning of August.



## Audience

Our audience outreach was broken down into two phases. The Phase One, we utilized a combination of Melissa Census Data and the “Hard to Count Score” developed by State Voices and TMC to prioritize certain census tracts, as well as newly reported response rates from the U.S. Census Bureau. We prioritized Census Tracts with a “Hard to Count Score” of 70 or higher and/or 2020 Census response rate below 50% in the following 11 target states and cities:

- Statewide focus: AL, AZ, FL, GA, LA, NC, NY, MS, and TX
- City-focused (all have high self-response rates for the state but not in key cities): MI (Detroit), and OH (Cleveland)

Then once we pulled audiences from those tracts, we limited it only to specific demographics, namely Asian/Pacific Islander, Black, Latinx, Native American, or Unknown in zip codes found within those census tracts.

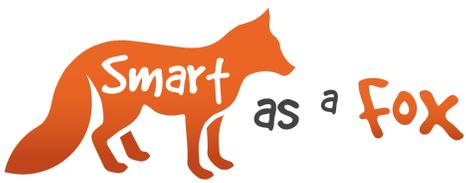
In Phase 2, six new geographic targets were added including, IL (Chicago), OK, SC, NJ, NM and NV and the audiences were selected based on the same demographic filtering. These targets only received two messages (Wave #1 and Wave #3), instead of three that the initial targets in Phase 1 received.

The Phase 2 target audience was slightly smaller because we only targeted counties that had low response rates at that point in the census collection process.

## Budget

This budget estimate was based on the goal of targeting 10 million hard-to-count individuals with five messages, for a total of 50 million SMS messages being sent between July and October 2020. That timeline was adjusted as the deadline changed from the end of October to September 31, 2020. While the budget remained the same with only three messages instead of five being sent to the full audience of just under 10 million (9,601,336 contacts), we then increased our target audience with an additional state expansion in Phase 2 of about 1.4 million (1,361,448).

State	ORIGINAL Send Universe Size
Alabama	506,523
Arizona	643,304
Florida	1,714,395
Georgia	1,383,230
Louisiana	525,902
Michigan (c)	258,642
Mississippi	220,975
New York	1,119,245
North Carolina	1,117,447
Ohio (c)	127,576
Texas	606,182
Spanish (ESP)	27,283
<b>TOTAL COE</b>	<b>8,250,704</b>
Illinois (C)	583,919
Oklahoma	20,147
South Carolina	271,462
New Jersey	129,561
New Mexico	135,549
Nevada	9,773
<b>TOTAL EXPAN</b>	<b>1,150,411</b>
<b>TOTAL</b>	<b>9,401,115</b>



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Project Segment	Smart As A Fox	Resistance Labs	Other	TOTAL
<b>Infrastructure</b>				
Technology	NA	Included	\$0 - VAN	\$560,000
Management	\$60,000	\$500,000	\$0 - State Voices	
<b>Messaging</b>				
Paid Texters	NA	Included	\$0	\$300,000
Aggregator (Twilio)	NA	NA	\$300,000	
<b>Audience Acquisition</b>				
Catalist Database	NA	NA	\$0	\$0
Additional Acquisition	NA	NA	\$35,000	\$35,000
<b>TOTAL</b>				<b>\$895,000</b>

The Resistance Labs costs were broken down by campaign management and paid texting, and messaging costs. We paid \$0.015 cents per text being sent by Resistance Labs, and \$0.005 cents per text message for texter training & support of our COE volunteer and paid texters.

### Resistance Labs - Cost Breakdown

Management & Send Cost	Texts	Cost
½ Texts RL Texters	25,000,000	\$375,000
½ Texts Coalition Texters	25,000,000	\$125,000
<b>Total Management Costs</b>	<b>50,000,000</b>	<b>\$500,000</b>

The aggregator pass-through costs for the messages we committed to sending were based on wholesale

rates Resistance Labs had from their aggregator with a volume commitment of 50 million SMS.

Messaging Cost	Cost / Unit	Units	Cost
Outbound SMS	\$0.004	50,000,000	\$200,000
Inbound SMS	\$0.0015	5,000,000	\$7,500
Outbound Replies SMS	\$0.004	5,000,000	\$20,000
Phone # Spin Ups / Month	\$0.35	160,000	\$56,000
Additional Texting Buffer			\$16,500
<b>Total Messaging Service Costs</b>		<b>50,000,000</b>	<b>\$300,000</b>



Because we didn't send five waves of messages we did not hit our total commitment of 50 million texts, which left a total of 20.4 million text messages paid for which we were able to use for 501c3 coalition GOTV campaign in October 2020.

Cost Breakdown per Message	Message #1 CENSUS	Message #2 CENSUS	Message #3 CENSUS
Resistance Labs	\$100,000	\$100,000	\$100,000
Aggregator (Twilio)	\$60,000	\$60,000	\$60,000
<b>TOTAL= \$480k</b>	<b>\$160,000</b>	<b>\$160,000</b>	<b>\$160,000</b>

We used \$575,000 of the original budget and the remaining message funds were reallocated to 501c3 election efforts. COE and the Census Equity Fund also made available \$300,000 in mini-grants to participating state lead organizations to cover volunteer recruitment and paid texting costs.

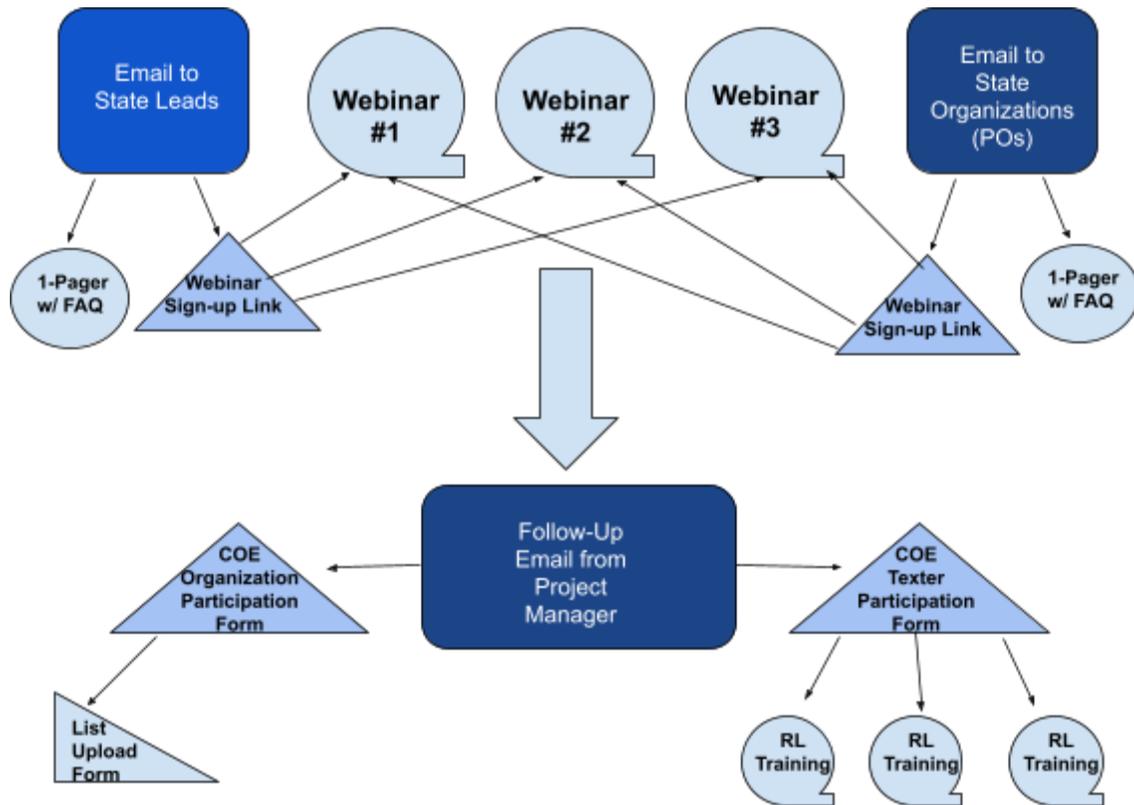
### III. Process Overview and Feedback

At the close of the COE Project we sent out feedback surveys to both participating state organizations and texters to get a sense of how they viewed the project, its infrastructure, tools, processes and management. This section will provide you an overview of those components and the participant feedback we received.

#### Onboarding

For this project we recruited **14 state lead organizations** representing eleven Phase 1 states, **100+ participating organizations** and one corporate partner. The hope was that we were offering enough of a value proposition to these organizations that they would be interested in joining the project. We anticipated funder, national and state coalition politics that we would need to manage as part of this recruitment process. Unfortunately, we were on an incredibly tight timeline if we wanted to get this project launched by July. Our recruitment window was between Monday, June 15 and July 20. But, we had a few groups join at the end of July, and we added expansion group recruitment of 6 state organizations for Phase 2 in August 2020. The goal was to have the following by the end of July:

- All state lead and participating organizations (PO) signed up
- All texters from those organizations signed up for training (or already trained), and
- All PO target lists they want to be added to our COE outreach provided to us in csv format requested for Catalist to dedupe and clean.



The recruitment workflow required that materials be provided to the organization to help them see the value proposition we were offering to their organization and the movement as a whole.

**We held a total of 36 state lead recruitment one-on-one meetings between June and August 2020.** These initial meetings were essential for getting each state organization to commit to the COE Project. In the meetings and the following webinars we would reiterate the benefits of the project:

- **Cost:** Texting and data are FREE to organizations who participate. Organizations will be responsible for staff & volunteer time, with onboarding and continuous support from the Project.
- **Efficient:** This collaborative approach protects integrity of the data, and prevents the increased likelihood of over duplicating efforts and outreach to the same audience.
- **Impact:** We can reach greater numbers of hard-to-count populations with your help!
- **Data:** At the end of this project, December 2020, all participating organizations can request an exported copy of their state targeted active contact list for use in 2021 and beyond.

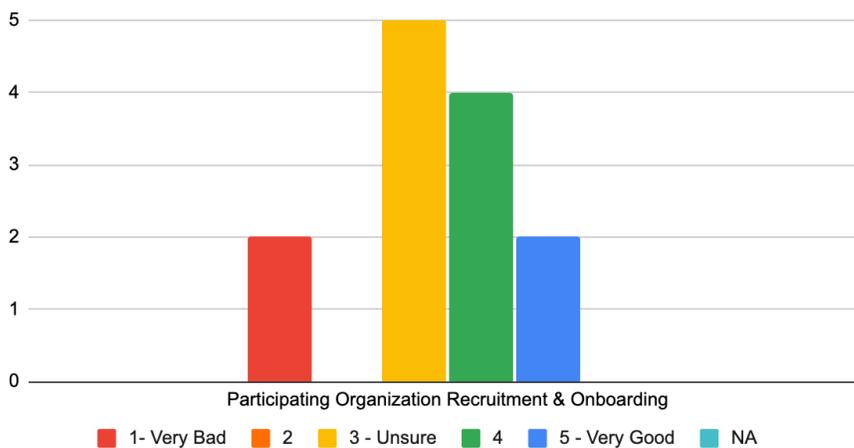


## Feedback

Given that we were building the tracks while the train was moving I'm not entirely surprised by the mixed opinions of the onboarding process. We began talking to groups in June, but due to delays in the approval and funding process, the bulk of this work had to be done in July, the same month we were planning to launch the first waves of Census text messages. Some groups we talked to early on, we had to re-approach in early July. The mini-grants we talked about providing to state leads were also delayed which led to some groups feeling overwhelmed and overcommitted without monetary support.

### Participating Organization Recruitment & Onboarding

COE Participating Organization Feedback Survey



One state lead shared that the program felt forced:

*“It was a nice program, but, it felt forced. Also, it was way more of a commitment than intended, with no initial funding. It ended up being more work and a greater commitment than initially explained. Also, it was a little unorganized.”*

Other state leads noted that it wasn't perfect, but overall the experience and impact was positive:

*“While there were some hiccups, I think the project was well organized. I thoroughly enjoyed working with Census Counts, Sandi, and Resistance Labs. The responses from our staff, volunteers, and national partners were overwhelmingly positive. People had fun and felt like they were making a difference!”*

*“I think the project was great overall. If there's one area of improvement, I'd say it'd be with regards to preparation and laying out the plan for partner organizations ahead of time. The only thing I found difficult about it is that, at times, it felt like we were building the plane as we were flying it.”*

Again, this mixed bag of feedback was likely due to the rushed timeline we were operating under. Overall groups felt that their organizations benefited, but they knew it had been put together quickly and there were issues that resulted due to that fact. If the project, budget and mini-grant funding had been approved earlier on we could have had more time for onboarding and state organization input.



## Training

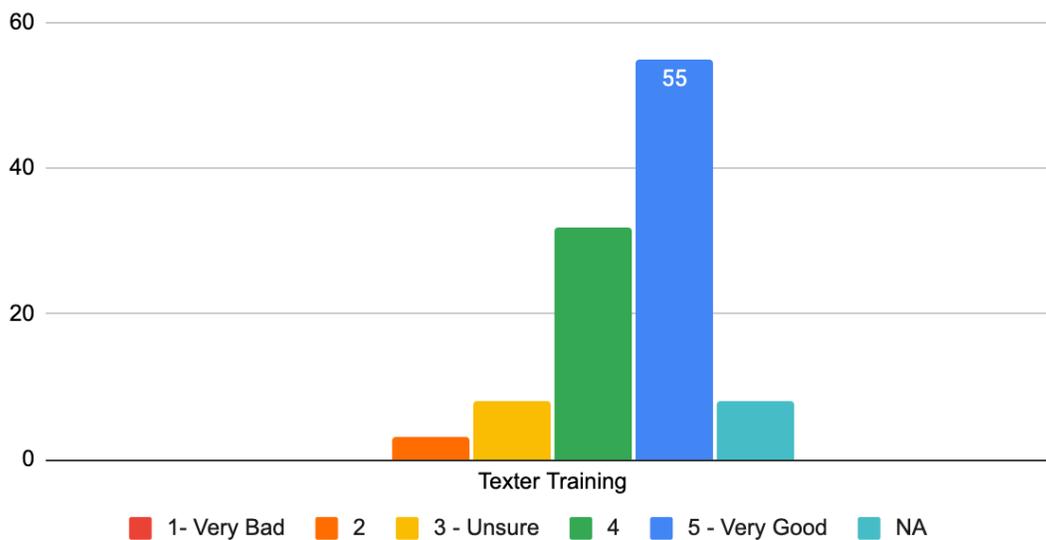
Resistance Labs began offering two 30 minute P2P/Spoke Texter Trainings per week in mid-July as we began onboarding organizations and asked them to recruit texters for the project. Trainings every Tuesday and Thursday were specifically for COE Texters, and the standard Resistance Labs training was also available on Saturdays. Recruited texters (paid & volunteer) were asked to fill out the Texter Participation Form, and pledge to register using the sign-up links in the form for one of the upcoming trainings.

We also offered training before our ten COE Project Textbanks and were able to train hundreds of Verizon volunteers and other COE volunteer texters. Over 1,000 volunteers and paid COE texters were trained for the COE Project through our live webinar trainings and 894 volunteer texters were also trained via our ten hosted textbanks (likely some overlap).

## Feedback

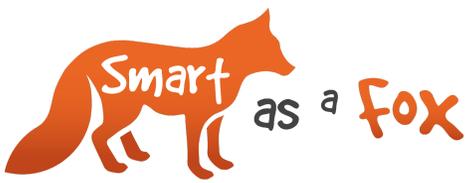
### Texter Training

COE & CE3 Texter Feedback Survey



When we asked texters how they would rate the training they received, it was largely positive. 82% of texters who responded to the Texter Feedback Survey said the training was “Very Good” or “good.” The few texters that had issues noted that:

- The COE trainings didn’t go over the scripts and canned responses for the upcoming wave.
- Texters had trouble figuring out how to sign-up for the live COE webinar trainings.



This was likely based on not receiving the information from partner organizations or not filling out the COE Texter Participation Form. While the Texter Participation Form included a link to the Zoom sign-up page for COE specific 501c3 friendly trainings, it appears some texters only joined the Slack Channel and didn't fill out the Texter Participation Form or sign-up for a training as directed.

Instead some texters watched the video training on the Resistance Labs website. The vendor support staff in the COE Slack Channel would periodically refer COE texters to these training videos and the live trainings were promoted on the same webpage. While they served as a good refresher, the issue was that these videos and the live webinars promoted on the Resistance Labs website were not 501c3 friendly (ie. nonpartisan). Several partner organizations complained about this and the COE Project Manager had to repeatedly monitor and remind the Resistance Labs staff to send texters to the COE Training Zoom registration page.

In the future, the texter training could benefit from being more specifically tied to the campaign messaging and content (ie. reviewing the scripts and walking through the process), as well as the technical aspects of using the platform and P2P best practices. With more time improvements could also be made to streamline the volunteer recruitment and onboarding process, including providing a landing page via Census Counts, instead of a series of Google Docs & Forms, that could easily be shared to help participating organizations. This would ideally lead to less miscommunication regarding training, and technology use.

### Implementation

We began COE implementation as we were onboarding state leads and other participating organizations in July 2020. As one state lead said "*at times, it felt like we were building the plane as we were flying it.*" and that was because we were. The content for message one was drafted and approved by COE National Partners before July 4, 2020, and then we would get each state lead's approval as they confirmed their participation and signed on to the COE Project. We asked the first group of state leads to review and approve the English & Spanish scripts by July 8, so that we could build the first couple state campaigns in Spoke to launch by July 12.

We also worked diligently with State Voices to ensure that the state target audiences were finalized after the most recent data acquisitions at the end of June. The first two states that had their list finalized and state lead launch approvals were Florida (July 11) and North Carolina (July 15), which were also our two largest state universes.

#### Wave 1

While we didn't have enough of our own texters trained to begin sending messages, Resistance Labs did. So we decided to rearrange the schedule to have their texters send out all of the first wave. As each new state target universe was ready and it's state lead signed on, we would send out message one to that universe. The rest of the states were launched as part of Wave 1 between July 19 and 25, with the exception of Ohio and Texas which didn't launch until August 2 and 3, due to a combination of state lead and list finalization delays.



By the beginning of August, additional acquisition had occurred and Resistance Labs texted message one to the new additions to the targeted state universes ahead of Wave 2. We also allowed newly added COE volunteer texters to help with this tail end of Wave 1 and we had our first COE Textbank on July 28, 2020 with 157 attendees in coordination with the Census Counts' Day of Action.

### **Wave 2**

The message two script was approved by all of the national leads by the end of July and state leads the first week of August. We launched Wave 2 on August 17 in all eleven states at 9am in each timezone. This was the first time we had a coordinated launch with COE's paid and volunteer state texters. Resistance Labs was advised not to let their texters send messages for COE until the 7-day Wave send window was closed. State leads had that week to coordinate their organizations and texters to send as many texts to their state target audience as possible. Resistance Labs was on stand-by to help pick up the slack as needed.

Some states, like Florida, far exceeded expectations, sending to more than half of their lists. This is primarily because their state leads ( FL Counts and FL State Voices) were not reliant on the Census Equity Fund mini-grants and had its own funding to provide to it's coalition of participating organizations to pay texters. Meanwhile some other states were still waiting on mini-grant funding and therefore relied on only volunteer texters. While volunteers were still incredibly productive in most states, it was the combination of the two that put Florida over the top. We also held four textbanks in August. Two were with our corporate partner Verizon and two were promoted by the Census Counts coalition. We had a combined 481 volunteer participants for the three textbanks.

At the end of August we had a Wave 2 close-out state lead check-in and went over everyone's "Pluses and Deltas" so far on the project. We also delivered overall and state-by-state specific reporting on how message two performed to all national and state leads.

### **Phase 2 Expansion**

At this time it was also agreed that only three 2020 Census messages would be sent, since the October deadline had been shifted to the end of September. This gave us less of a runway and message spacing than we had originally planned. Since we had paid for Resistance Labs to send 25 million paid texts, and use 50 million SMS messages in total, we looked for ways to expand our target audience over less messages. This led to the launch of Phase 2, which added six new states to target based on current response rates by county and minority populations.

They would only be receiving messages one and three. We did an accelerated outreach and onboarding for state leads in Phase 2 and only asked permission to use their name as the sender of the texts. Many of these groups were happy to be able to have this additional outreach capacity without having to lift a finger on their end. While message two was sent in Wave 2, Resistance Labs texters were able to send the first message to the new state target universes in August.



## Wave 3

We launched our last and final wave on September 7, which was 1-2 weeks after our target audiences received their second text from us. This wave launched much better than Wave 2, since both state organizations and texters were finally getting the hang of using both the Slack and Spoke technologies. States continued to coordinate their own text banks and days for their organizations to prioritize texting during the one-week send window. At this point texters were looking for more opportunities to send P2P texts. Both Resistance Labs and COE Texters helped send message three to the Phase 2 expansion states between September 22 until the deadline on September 30.

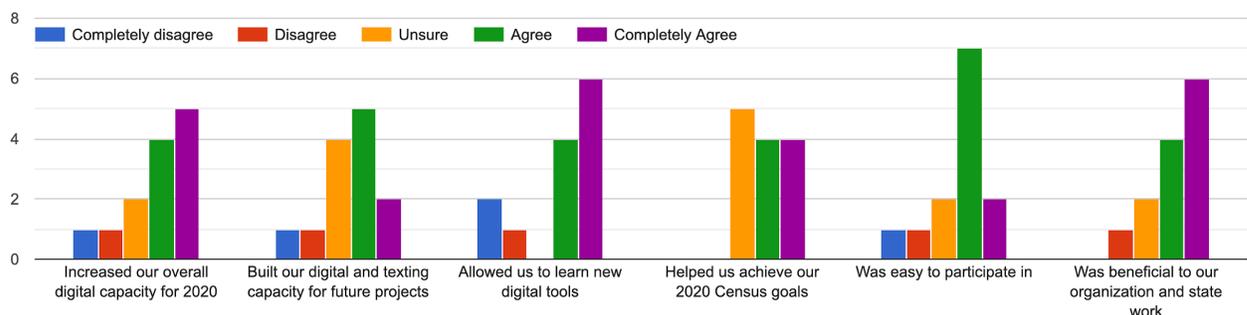
We held another four textbanks in September for Wave 3 that had a combined 256 volunteer texters. Two were promoted by Census Counts and two were with our corporate partner Verizon.

At the beginning of October, we had a close-out state lead check-in and went over everyone's "Pluses and Deltas" for the project. We also delivered overall and state-by-state specific reporting on how message three performed to all national and state leads.

## Feedback

Overall state leads and participating organizations who responded to requests for feedback were positive. For each specific statement below 62 to 77 percent of respondents stated that they "agreed" or "completely agreed" with five of the following statements (see graph below). The only statement with less than 62 percent agreement was "Built our digital and texting capacity for future projects" which had 54 percent "agreement", and 31 percent "unsure". Only one state's respondents offered "completely disagree" or "disagree" on this question.

Please let us know how much you agree or disagree with each of these statements. Participation in COE:



Of the vast majority of the organizations who participated had a positive experience, with 62 percent of state leads said the overall project management was "good" or "very good." They found COE easy to participate in and beneficial to their respective organizations and goals. They also agreed that it increased their digital capacity and enabled them to learn important new technologies to use in the future.

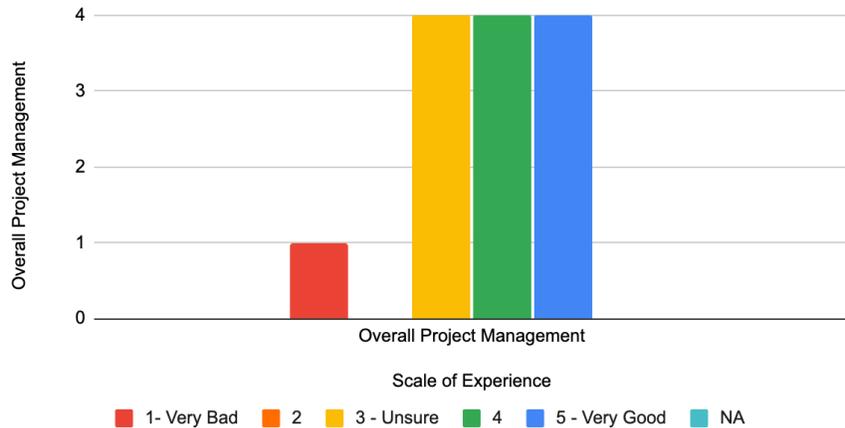


There was one negative review. That specific state lead noted they felt that their was too much reliance on external consultants:

*“The COE model creates a dependency on external consultants or orgs to be able to carry out texting campaigns. This created tensions with some key partner organizations that threatened to discontinue participating in the COE project because of the dynamics created, especially around transparency re: universe totals, scripts, volunteer tracking, etc.”*

## Overall Project Management

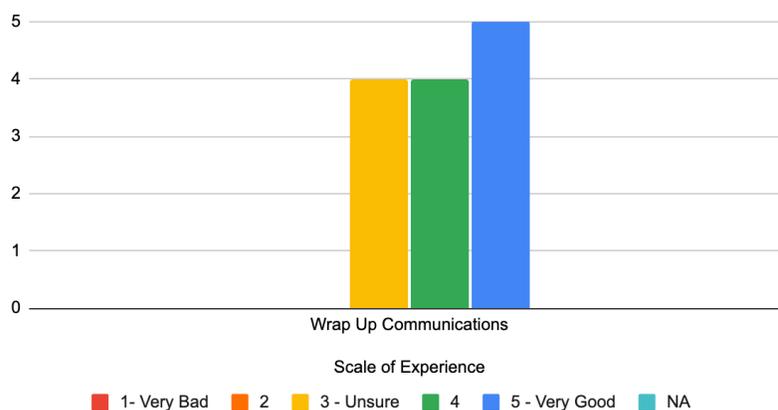
COE Participating Organization Feedback Survey



But many others noted that they couldn't have participated in the COE Project if it hadn't been for the Resistance Labs paid texter support and the infrastructure that was built. Capacity was a very big concern during onboarding conversations and during initial stages of implementation.

## Wave Launch Implementation and Wrap Up Communications

COE Participating Organization Feedback Survey



This concern was due to resources being expended by trying to manage both 2020 Census and Election work simultaneously during a global pandemic that was greatly impacting the communities many state groups worked with. Every state was given a shared “State Capacity Worksheet” at the beginning of the project which included the state target universe totals, registered state participating organizations and texters.

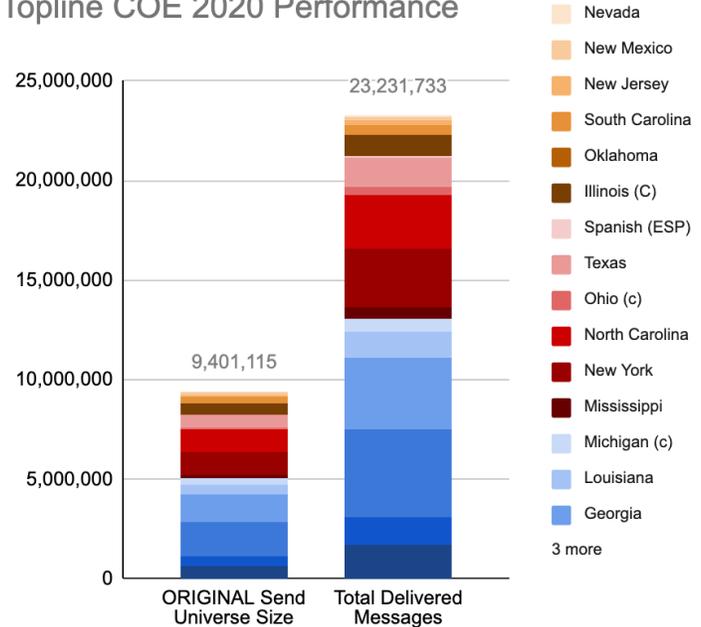
This spreadsheet was updated before and after each launch with new participant sign-up information and reporting on message performance metrics for individual states after each wave concluded. We also held COE state lead check-ins before each launch and at the end of each wave to receive organization feedback. 69 percent of participating organizations rated this experience “good” or “very good.”



### IV. Topline Performance

Now let's talk about those performance metrics for the entire COE campaign. We sent a total of three messages between July and September of 2020 at a rate of one message per month. We saw good engagement to our cold list of 9,401,115 contacts. "Cold" texting refers to outreach to contacts who the sender has no relationship with. This entire campaign revolved around texting outreach to a cold list of contacts. We sent a total of 23,231,733 initial text messages and 29,568,989 SMS segments.

Topline COE 2020 Performance

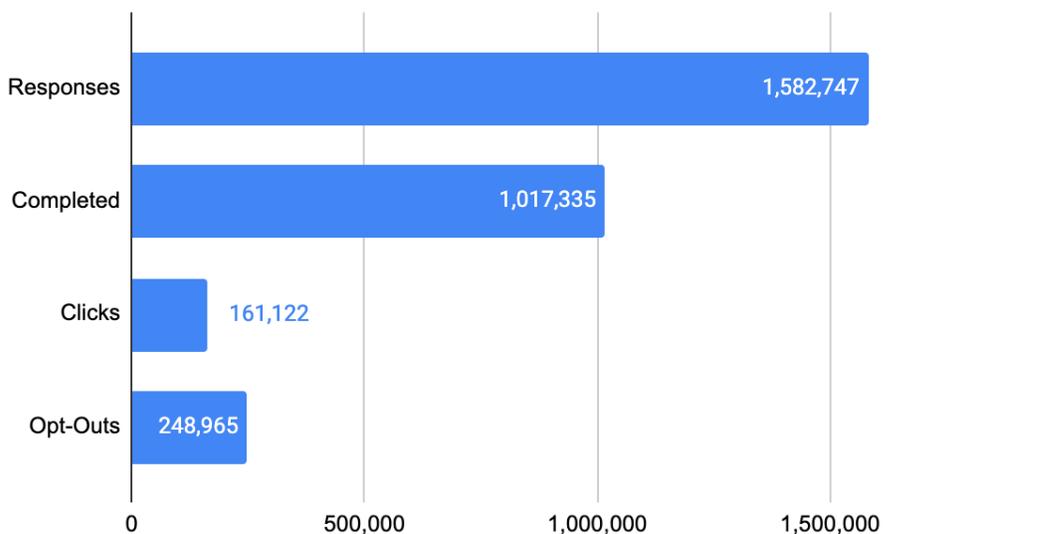


### Engagement

Despite the lack of a relationship with hard-to-count (HTC) audiences in 17 target states, our outreach via text message saw an engagement rate of 7.51%. The engagement rate is a combination of responses and link clicks in relation to the number of messages sent. Of all those we texted, 1,037,335 (10.82%) informed us that they had completed the 2020 Census (ie. done/self-reported completion rate). With just our Phase 1 audience of 11 states, 11.6% percent responded that they completed the 2020 Census.

### COE Mobile Engagement Toplines

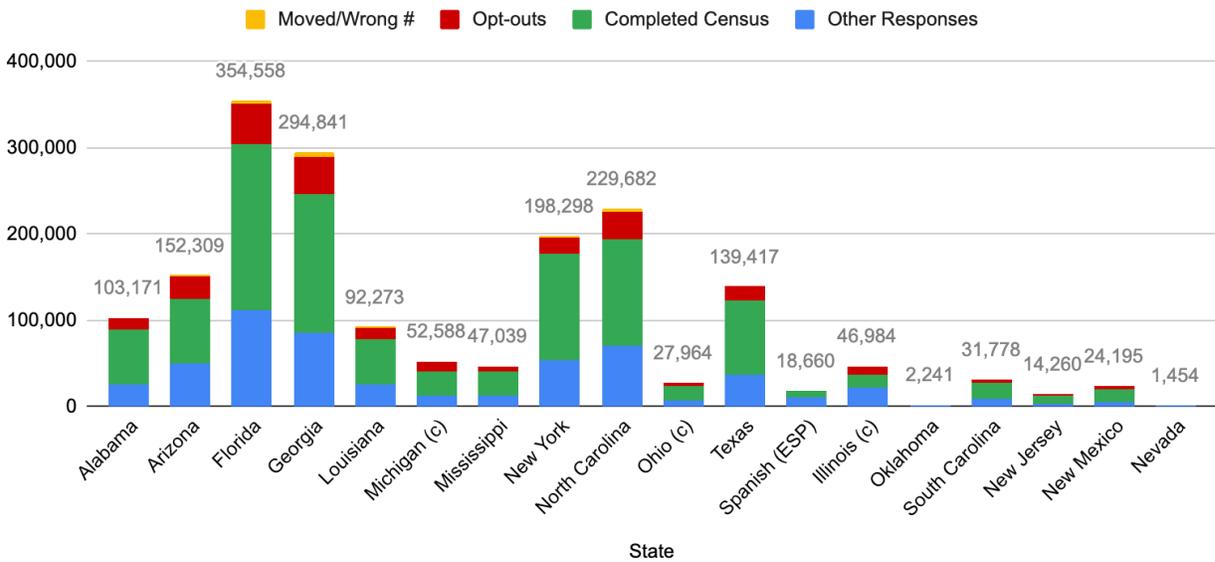
2020 Census Outreach Expansion Project





Any opt-out rate under 1% is considered very good and 1-2% is average. We saw low opt-outs across the board with a 1.07% opt-out rate for all three messages combined and 2.65% of the target universe opted out over the course of the campaign. This slightly higher opt-out rate was largely from the first message wave having 66% of the campaigns' opt-outs. Messages two and three had a 0.6% and 0.57% opt-out rate respectively. The higher opt-out rate was due to message one being our first contact with this cold list, while they were also likely receiving an influx of other 2020 Census and election related messaging at the same time.

## COE State by State Toplines

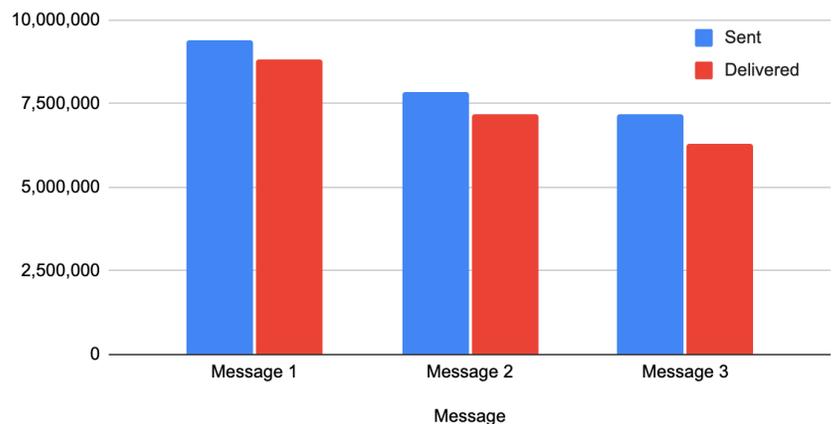


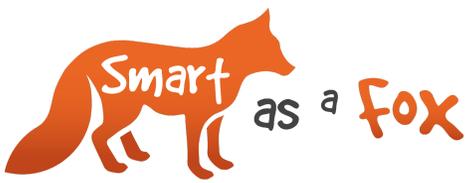
## Deliverability

Issues with message delivery were expected with such a massive data acquisition for this cold texting campaign in collaboration with other allied organizations. The first two messages saw a 94% and 92% deliverability which is within the acceptable range for a cold message campaign. As we saw with previous cold texting campaigns the deliverability declined with each new message wave ending with a 87.61% deliverability rate for message three.

## COE Mobile Message Deliverability

2020 Census Outreach Expansion Project





You'll notice that from the original data acquisition (chart below) we lost 15% of the numbers purchased after we removed duplicates (one number associated with multiple people in a household) and invalid numbers (not a 10 digit phone number or clearly a landline). This was before we even began texting. The deliverability stats above were based on the valid unique numbers we were able to send initial messages to.

DATA VALUE & DELIVERABILITY					
State	Original Universe	Valid Unique #s Texted	% Valid	Initial Delivered Messages (Message #1)	Deliverability Rate
Alabama	612,302	506,523	82.72%	468,560	92.51%
Arizona	731,379	643,304	87.96%	609,588	94.76%
Florida	1,927,909	1,714,395	88.93%	1,613,660	94.12%
Georgia	1,561,337	1,383,230	88.59%	1,308,317	94.58%
Louisiana	605,124	525,902	86.91%	475,725	90.46%
Michigan (c)	314,187	258,642	82.32%	249,901	96.62%
Mississippi	313,144	220,975	70.57%	202,001	91.41%
New York	1,323,670	1,119,245	84.56%	1,057,960	94.52%
North Carolina	1,237,501	1,117,447	90.30%	1,062,094	95.05%
Ohio (c)	165,080	127,576	77.28%	119,203	93.44%
Texas	809,703	606,182	74.86%	559,927	92.37%
Spanish (ESP)	NA	NA	NA	27,121	NA
<b>TOTAL</b>	<b>9,601,336</b>	<b>8,223,421</b>	<b>85.65%</b>	<b>7,754,057</b>	<b>94.29%</b>
Illinois (C)	694,126	583,919	84.12%	559,892	95.89%
Nevada	10,736	20,147	187.66%	17,707	87.89%
New Jersey	153,005	271,462	177.42%	251,005	92.46%
New Mexico	167,441	129,561	77.38%	122,296	94.39%
Oklahoma	23,595	135,549	574.48%	126,083	93.02%
South Carolina	312,545	9,773	3.13%	9,109	93.21%
<b>TOTAL</b>	<b>1,361,448</b>	<b>1,150,411</b>	<b>84.50%</b>	<b>1,086,092</b>	<b>94.41%</b>
<b>FULL UNIVERSE</b>	<b>10,962,784</b>	<b>9,373,832</b>	<b>85.51%</b>	<b>8,840,149</b>	<b>94.31%</b>

The first message sent is always met by a combination of blocking messages due to disconnected numbers, bad numbers or landlines not caught earlier, and lastly those marked as spam.



We expected deliverability to decline over the course of the campaign and be higher for the first two messages, which is a trend we saw with similar Link2Tek cold texting campaigns. We also texted during a period of much higher than normal texting traffic which resulted in the carriers blocking more and more messages as spam.

In order, to combat this we would monitor for deliverability over the course of each wave send window. Resistance Labs would flag if any state was having lower than 90% deliverability and within 24 hours we would switch out problematic longcodes (the local numbers messages were sent from that were blocked), change out problematic short links, and create message variants to prevent further spam blocks. Because we couldn't make changes until the next day states that were flagged still had high deliverability issues, but this helped us prevent future issues in other state universes we hadn't started texting yet. We also would resend messages to those numbers who had messages first blocked as spam.

The states which had the worst deliverability over the course of the entire campaign were Mississippi (90%), Louisiana (84%), Texas (90%) and all of the Phase 2 expansion states which were only sent messages one and three. Message one had good deliverability in all the states except Oklahoma (88%), but when averaged with message three which was sent in September with the worst deliverability numbers across the board, it brought those Phase 2 deliverability numbers down. Message three deliverability was the highest at 95% in North Carolina and the lowest in Oklahoma with 69% deliverability.

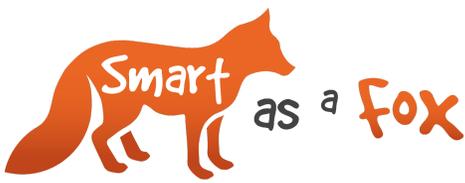
Overall the numbers were within an acceptable range for a cold peer-to-peer texting campaign, especially given the climate and increased oversight by the mobile carriers during this period.

## A/B Testing Results

When we first began noticing issues with deliverability for message 1 in July, we took it as an opportunity to run a few tests with Florida and Georgia, our two largest target universes. Our first test looked to see if the versioning of three randomized scripts per initial message and response messages would improve deliverability.

TEST A	TEST B	TEST C (if applicable)	Results
96.7% deliverability on the first message (233,967)	96.85% on the initial of message with versioning (241,902)	81% (A - 1,420) and 91% (B - 1,220) deliverability on the second message with and without versioning	No difference in deliverability for the initial message, but there was a 10% difference in deliverability on the response message. That being said there were clear deliverability issues on the second message both with and without versioning, likely due to it having a link.

The variation of messages had a measurable impact on the response message, but not on the initial message with this test.



The next test we ran on message one also looked at deliverability, but this time we tested including a short link versus the official .gov link in the initial text message, instead of the original script which had the link only in the response message.

TEST A	TEST B	Results
91.1% Deliverability Rate for the message with the .gov link in the first message (135,186)	90.4% Deliverability Rate for the message with a shortlink in the first message (115,497)	There was only a 0.7% difference in delivery between the audiences that received the shortlink vs. the .gov official link in the first message. But Message A with the .gov also had a slightly higher response rate of approx. 0.6%. Based on these results there is not a statistically significant difference.

We found no measurable difference including an official vs. unofficial link in the initial message, but did learn that our original decision to include the link in the second message was sound and lead to higher deliverability.

The third test we ran was on message two. One of our state leads requested that we include “home visit” language in the initial message as a way to communicate to our HTC audiences that someone from the Census Bureau would come to their door if they did not respond to the Census in advance. For this test half the messages included “home visit” messaging, and the other half were just sent a direct ask on how they plan to respond to the 2020 Census.

TEST A	TEST B	Results
99,983 had a 9.61% overall response rate and a 9.18% requested response rate (1, 2, 3, 4) and only had the question "How will you respond to the census?"	95,144 had 10.02% overall response rate and a 9.74% requested response rate (1, 2, 3 or 4) and included the “home visit” or “respond before the knock” language.	There was only a 0.4% difference in response rates between those who had only the direct "How?" ask vs. additional homevisit language. The results are technically not statistically significant, but we believe that Message B performed slightly better because of the social pressure involved with the “home visit” language.

While the results were not statistically significant, we decided to keep the “home visit” language in order to provide a “social pressure” component to responding to the census as soon as possible. That being said it also caused message recipients to send responses that were incredibly suspect, concerned and confused that someone might come to their home in the middle of the pandemic. A canned response was drafted to ensure that texters could respond with an explanation.

The last major test we ran on message two was regarding the deliverability of whitelisted link domains. We learned through our national partners that we could request certain shortlink domains



be whitelisted to the mobile providers by the Census Bureau. Whitelisting means that certain domain links in messages (ie. census.gov, or cen.us) are categorized as acceptable to the carriers and not filtered as spam. We also wanted to see if including two links with one link not being whitelisted in our “Already Responded” response message would impact deliverability. The first was a census.gov link that used a whitelisted short domain, and the second was a link to a Census Counts share action for those who had already responded to remind their friends and family.

TEST A	TEST B	Results
5,251 had both the whitelisted and social share short links and had an 87.28% deliverability rate.	5,508 had only the whitelisted link and had a 87.01% deliverability rate.	Clearly there was no difference in impact on deliverability between both Response 4 options. Therefore we will move ahead with both links in the response. But the under 90% deliverability rate is something we believe now is not due to the links, but possibly the # of times the same message is sent or other language triggers.

We discovered no statistically significant difference in deliverability for response rates with both links vs. only the whitelisted link. Therefore we included both links in the remainder of Wave 2.

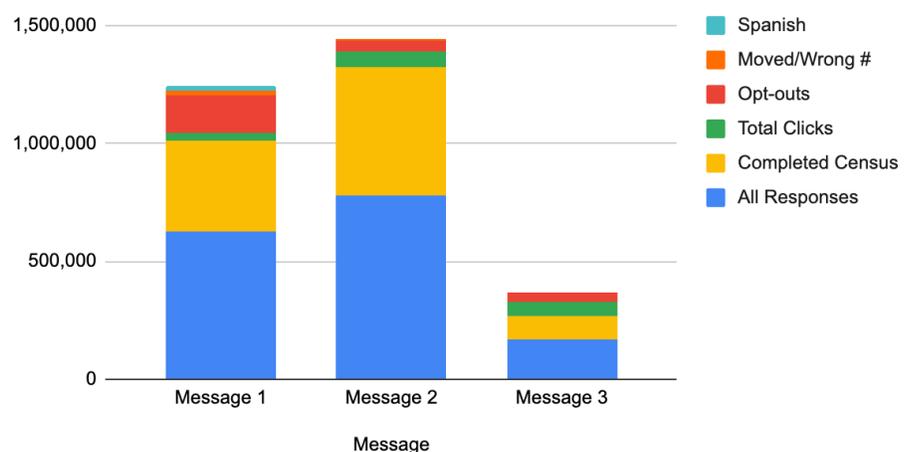
Additional trial and error testing throughout the COE campaign led us to use message versioning or variants throughout and links in the response message versus the initial message.

## V. Message-by-Message Results

Now it's time to take a look at how each individual message performed. As you can see from this chart, responses declined significantly as we got to the last message. This was expected due to message fatigue and because the most responsive individuals were removed from the audience when they informed us they completed the census.

COE Mobile Engagement and Opt-Outs

2020 Census Outreach Expansion Project



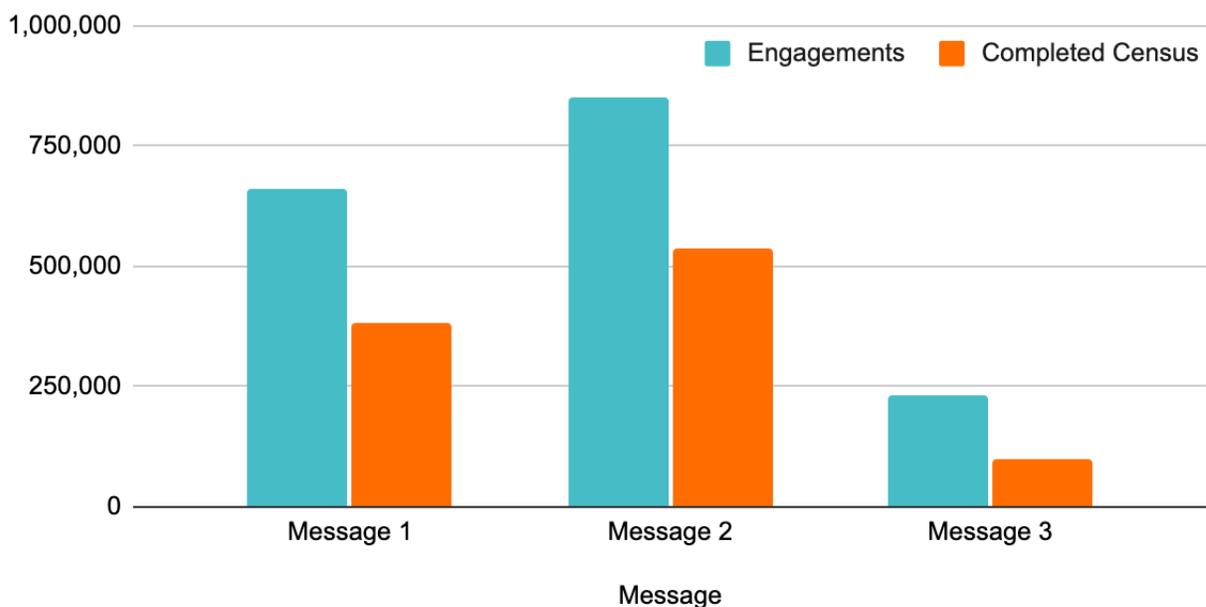


The best indications of message success are engagement rate which is the combination of engagement metrics, specifically the number of clicks and responses compared to those who received the message. If recipients engaged in any way with our message we were able to provide them with important information that would allow them to complete the census.

Similar to how response rates declined, the same occurred for engagement rate. The self-reported completions (ie. done rate) were higher when the message specifically asked people to tell us if they had already responded to the U.S. Census. Message two had the highest engagement, response rates and census completions of all three messages.

## Census Completion and Engagement Rates

2020 Census Outreach Expansion Project



### Wave 1

The first message, sent between July 11 and August 3, 2020 for Phase 1, and between August 26 and September 3 for the Phase 2 expansion asked the target audience if they responded to the U.S. Census yet. But it also included a soft ask if they want messages in Spanish, “Para el texto en español SP”. This is how we were able to determine the HTC target’s preferred language for the remainder of the campaign.

#### Message 1

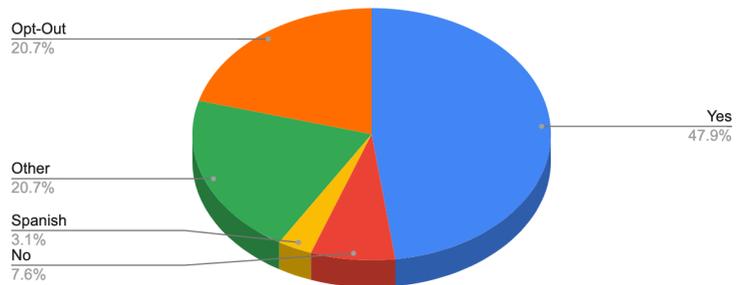
Hi this is [SENDER NAME] from [ORG NAME]. During this COVID crisis, the census is crucial for our community. Have you filled it out? Para Español envíe ESP



As you know we ran a series of deliverability A/B tests in July for message one, and learned that variations can help with response delivery rates and that our decision to keep the link in the response message was the correct one.

This message wave saw a good 7.48% engagement rate, likely due to the engaging “call and response” nature of the message. The vast majority of responses to message one was “Yes” they had already completed the 2020 Census, which was likely due to other campaigns doing outreach (text, phone, ads, et al.) between March and July 2020. 7.8% responded “No” and were provided with a link to complete the 2020 Census online. Of those who responded to the initial text, 4.94% clicked on the links we provided them.

COE Message #1 - Responses  
2020 Census Outreach Expansion Project



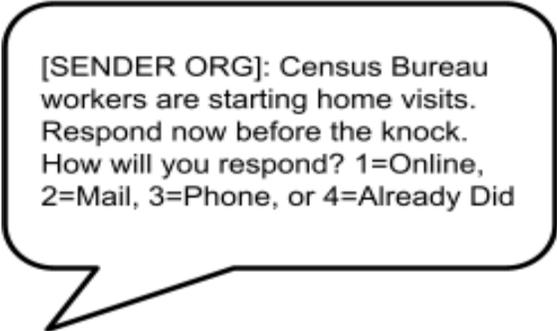
Also, **22,208 HTC individuals responded to the soft ask and requested to receive the text messages from us in Spanish (3.1% of responses)**. NALEO staff was then tasked with sending out message one and the following messages to them in Spanish. A total of 0.28% of the target universe received text messages in Spanish over the course of the entire campaign.

This message had the highest opt-out rate of 1.87%, but it is still within an acceptable range for a peer-to-peer campaign to a cold list.

**Wave 2**

The first text of any SMS series tends to have the best response and engagement rates, which decline as each new message is sent. But in this series, message two outperformed the first message. The second message was sent between August 17 and September 7. Only the Phase 1 audience with the original 11 states received message two which asked the target audience how they were planning to respond to the U.S. Census. It also included the “home visit” language we tested, which added social pressure to respond quickly.

**Message 2**



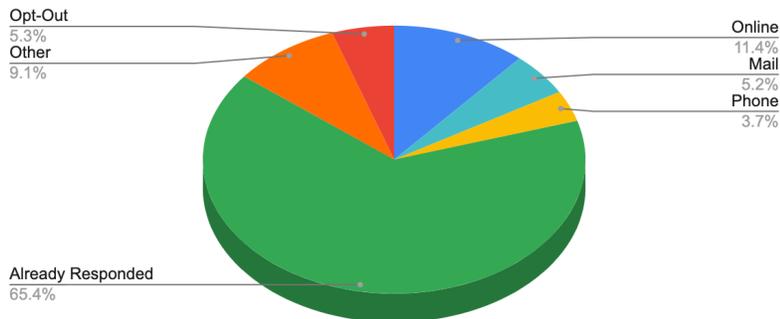
This message wave saw a strong 11.86% engagement rate, likely due to a combination of social pressure and the engaging “call and response” nature of the message. Over 539,000



# Final Report

## COE Message #2 - Responses

2020 Census Outreach Expansion Project



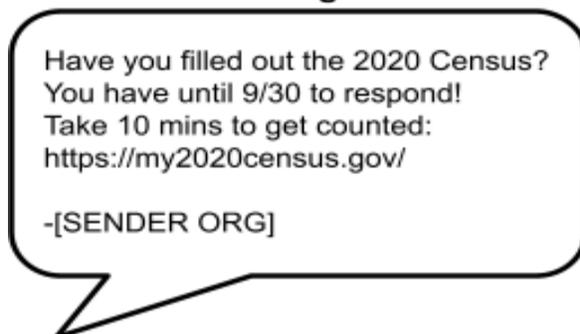
Self-reported that they completed the U.S Census already, which gave us a 10.87% “Done” or self-reported completion rate. Of all the responses, the majority of 65.4% informed us that they had already completed the 2020 Census, likely due to our first message and the outreach of other civic-minded organizations. We were also able to provide 20% of the respondents with information on how to respond online, by mail or over the phone depending on

their response. Of those who responded 1, 2, 3 or 4, 9.06% clicked on the links we gave them in our tailored response. Message two also had an incredibly low opt-out rate of 0.60%

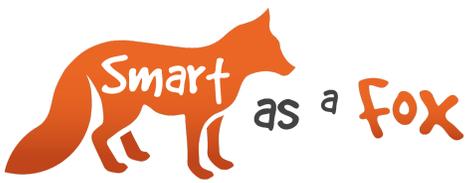
## Wave 3

The third message was sent between September 7 and 30. The Phase 1 audience with the original 11 states received message three at the beginning of September, while the Phase 2 expansion audience received the last message in the last two weeks of the month. As noted earlier, message fatigue is quite real and engagement on message three was much lower at 3.19% compared to the first two messages. This message wasn’t as engaging and didn’t require a text response, but did have an ask “Have you filled out the 2020 Census.” We also included a link in the initial message, with the hope that as many of our target audience as possible be given the tools to respond online before the stated deadline. A total of 97,215 (1.35%) targets informed us in Wave 3 that they completed the Census and 59,168 (0.91%) clicked on the link we provided in the initial message.

### Message 3



It’s impressive that the opt-out rates remained as low as they were at only 0.57% throughout the last message wave given message fatigue and the fact that the carriers were becoming more rigorous in what they blocked as spam. In September, the mobile phone carriers via their industry association the CTIA, released a statement that they would be more vigilant beginning that month in blocking messages that violated TCPA (Telephone Consumer Protection Act) and CTIA regulations.



This new vigilance likely led to the 87.61% deliverability of the last message in the campaign. For this last wave over 1 million of our hard-to-count audience didn't receive the third and final census reminder. This could also be attributed to the decision to include a link in the initial message.

## VI. Comparisons

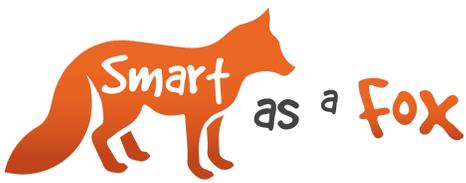
When we looked at the Census Outreach Expansion (COE) Project performance compared to two Link2Tek campaigns it becomes clear that less is more. Link2Tek's campaigns sent five and nine messages respectively to hard-to-count audiences over a longer period of time (April/May until September), while the COE Project only sent three messages to its target audiences at a rate of one per month between July and September. With a 7.51% engagement rate it out-performed the nine message Link2Tek campaign and had a click-through rate that was five times higher and double both Link2Tek campaigns.

While the overall "DONE" or self-reported completion rate was higher for the Link2Tek campaigns, that could be due to the timeline when the COE messages were sent. Between July and September, the Link2Tek campaigns resulted in lower completion rates (under 3% "DONE" rates) for messages five through nine. If we had launched COE earlier in April or May, we might have had similar high self-reported completion rates. During the COE launch timeline we were beginning to compete with an over saturation of messages with GOTV texts beginning to be sent and more people had been exposed already to 2020 Census outreach. Despite the timeline, due to the larger number of COE targeted individuals, the project still resulted in four times as many self-reported completions (1,017,335) compared to the Link2Tek campaigns' combined result (257,288).

Campaign	Audience	Delivered	Deliverability Rate (%)	Responses Rate %	Clicks Rate %	Engagement %	5   Done*	Done %	Opt-Outs	Message Opt-Out Rate (%)	Campaign Opt-Out Rate (%)
Link2Tek NVF (Messages 1-9)	1,089,132	7,740,158	94.98%	4.34%	2.45%	6.79%	214,718	19.71%	38,151	0.49%	3.50%
Link2Tek FL Counts (Messages 1-5)	178,376	890,342	96.40%	7.74%	5.27%	10.56%	42,570	21.29%	4,652	0.52%	2.61%
COE (Messages 1-3)	9,401,115	23,231,733	91.08%	6.81%	10.18%	7.51%	1,017,335	10.82%	248,965	1.07%	2.65%

While the total number of opt-outs is clearly higher for the COE campaign and the per message opt-out rate is double the Link2Tek campaign at just over 1%, COE actually had lower percent of opt-outs from its target audience (2.65%) than the 1-9 message Link2Tek campaign (3.5%).

Meanwhile, deliverability was about the same across the board for all three campaigns. This is interesting because we were told we were getting superior data by renting numbers via Link2Tek's direct Telecom registry relationship. We fully expected a mixed result with the Catalist and Target Smart data we acquired between May and August 2020. But unlike Link2Tek, that data wasn't being rented, it was fully owned by State Voices and all of its 501c3 partners.



An equally important comparison is the cost of these projects. While the COE Project cost \$360,571 more than NVF’s Link2Tek Campaign the number of targets reached was ten times higher and number of self-reported completions was three to five times higher. More so, the cost per message was more than double and cost per self-reported completion was similarly three to four times more expensive on the Link2Tek projects compared to the COE peer-to-peer project using Spoke.

Campaign	Project Cost	Delivered	Cost Per Message (\$)	Completed	Cost Per Completion (\$)
Link2Tek Messages 1-9	\$825,000	7,740,158	\$0.11	214,718	\$3.84
Link2Tek FL Messages 1-5	\$123,000	890,342	\$0.14	42,570	\$3
COE Messages 1-3	\$1,185,571	23,231,733	\$0.05	1,017,335	\$1

## VII. Conclusions and Lessons Learned

Overall this project was a huge success and enabled us to reach over nine million hard-to-count individuals with information on how to complete the 2020 Census.

- 10.82% of the target audience, a total of 1,017,335 people, informed us that they completed the 2020 Census.
- Of the 29.6 million text messages sent we had a 7.51% engagement rate.
- Throughout the entire campaign opt-out rates remained close to or under 1%.
- This project brought together national leads, funders, corporate partners, progressive vendors, over 100 state organizations and over 1,400 volunteer and paid texters.
- 69% of participating organizations surveyed (mostly state leads) had a positive experience.
- 92% of texters surveyed said that they had positive experience with the COE Project.

Those texters who participated shared stories about how they were able to help the individuals they reached out to over text messages. These are just a few examples of the impact we had.

*“The respondent then asked how he or she could fill out the census over the phone as opposed to online because he or she did not have access to the internet. I provided the information and we ended on a much happier note. I felt confident that the person filled out the census over the phone.”*

- COE Texter, 2020

*“I had one conversation with a person who was very adamant about not wanting to participate in the Census because he was not comfortable with the government having so much information about him and his family. After letting him know that the information would be kept confidential, and that he would be helping his entire community by participating, he finally agreed.”*

- COE Texter, 2020



Of those who responded to the survey, 72% of texters said “they personally provided information to people that resulted in them being able to participate in the census or the election when they might have otherwise not done so.” Many felt that the number of quality conversations that they had made up for the other rude, insulting or disrespectful text responses they received. Those offensive responses were of course the number one negative noted by texters who responded to our survey.

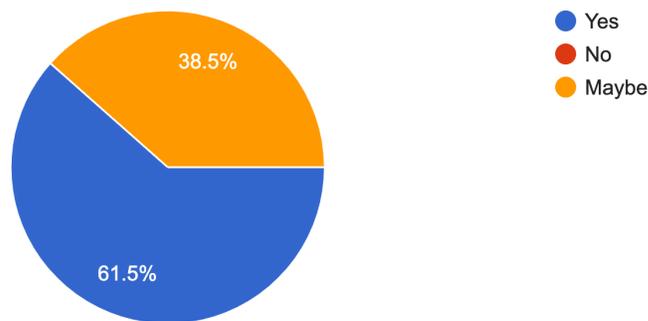
Texters also noted the following positives:

- “Slack was easy to use: I used many platforms in the last two months, Spoke is the most usable one in my experience.”
- “Feeling like I was making a difference”
- “Knowing that so many people who otherwise would not have participated did so as a result of the campaign's efforts.”
- “The (textbank) parties, the other people I met, the Moderators (Slack Support Team”
- “I liked being able to reach a lot of people in a short amount of time to share important Census information. I felt empowered.”

We asked state leads and other participating organizations if they still would have participated in this kind of project had we not been dealing with the COVID19 Pandemic, and 61.5% said they would and the remaining 38.5% said they might have still participated.

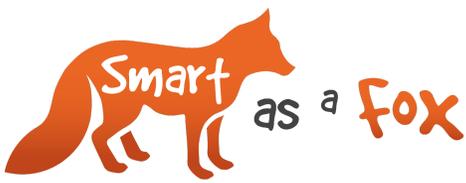
If the COVID19 pandemic had not happened this year do you believe you would have still participated in this kind of peer-to-peer texting project?

13 responses



Participating organizations cited the following top three reasons they participated in the COE Project:

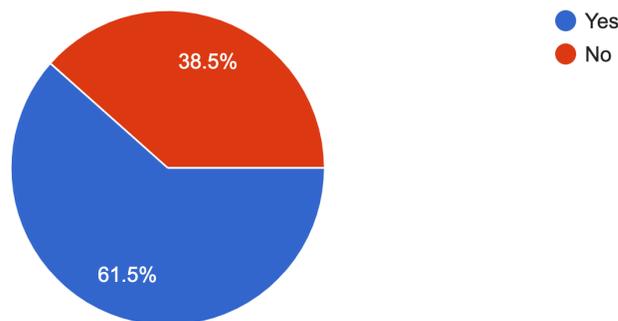
- 61.5% said, “The opportunity to work with organizations across the state and nation for a common goal”
- 53.8% said, “The added digital capacity it provided our organization during COVID19”
- 46.2% said, “Access to VAN and list acquisition opportunity to get the data at the end of the year”



Of those who participated 38.5% had never run a statewide texting campaign before COE, so we were not only able to introduce many to new digital organizing technologies like Spoke and Slack, but also show them the value of texting outreach and organizing can have on their future campaigns.

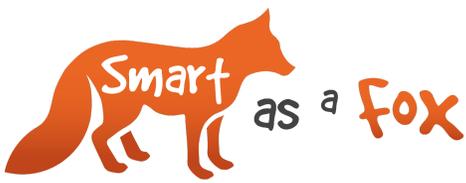
Before the COE project, had your organization ever run a statewide peer-to-peer texting project?

13 responses



Throughout this project we ran into a couple obstacles and learned important lessons to note if we attempt a similar campaign in the future.

- **Census Deadline Changes:** Originally we planned for an August U.S. Census deadline for self-responders, but that changed to late October once extensions due to COVID19 were requested. This updated deadline would have allowed us to send four to five messages and space them out more. But over the summer that timeline was shortened to the end of September. This made message timing and spacing more difficult. Therefore we decided to limit the campaign to three messages, one per month. We had to wait to update the state leads on the Wave 3 launch dates because of questions on whether the deadline would get pushed back into October (ie. ongoing court challenges) giving us more time and space for the third wave launch to straddle September and October.
- **Tight Timeline:** We were working an incredibly rushed timeline given what we were trying to accomplish with hundreds of stakeholders in less than four months. Building an outreach infrastructure and campaign to send millions of messages to hard-to-count audiences with full stakeholder buy-in required more of a top down managed approach to meet the timeline. The concept for this project was first brought to key stakeholders in March of 2021, and in early April 2021 a budget estimate was drafted. A full proposal was provided upon request in early May and not approved until the end of the month. Most work couldn't even begin until Mid-June, leaving us only 3-4 months to develop the project and launch the campaign. In order to conduct the outreach planned in 17 states to almost 10 million targets within the three months we had remaining, we had to "build the tracks while the train was moving." The onboarding process felt rushed, because it was. But, we worked with the hand we were dealt.



- **Capacity Concerns:** Some of the primary challenges on this project at the beginning were partner organization capacity due to the pandemic and state organizations feeling overwhelmed as they adapted to their new normal, remote work and juggling both the U.S. Census and 2020 Election. Many were concerned they couldn't recruit enough volunteers to text their whole universe. We built out the infrastructure, processes and campaigns in order to meet those needs. While many participating organizations appreciated how thorough the capacity coverage offered was, a few were upset about how and when that support was delivered.

On a few occasions, Resistance Labs jumped the gun and provided their texters with state target audiences to text before the state leads had a chance to launch their campaigns or allow their paid/volunteer texters to finish text messaging. Some groups also scheduled their own textbanks without proper notification, either at the tail end of the wave send window, or after it. In these cases, Resistance Labs staff didn't know to hold a certain number of texts for their state in advance. This led some state leads to be unhappy that they did have texts available to send for their state. Some state leads used this as an opportunity to support other states, while leads didn't jump at the chance to help text other states universes.

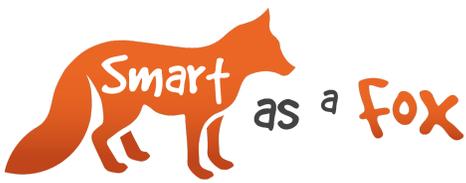
- **Funding Delays:** Mini-grants for participating organizations which were originally hinted at as part of the onboarding process, weren't fully approved until the beginning of August and the money wasn't made available until late August in time for the last and final Wave in September. Because of these delays and uncertainty of the funding, many state groups couldn't plan ahead and have paid texters recruited for Wave 2 or Wave 3. Some groups may have paid themselves back if they put their own money towards paid texters, or volunteer support. Other state leads like Florida planned it's own funding/budget to allow participating organizations in their coalition to recruit paid texters and their capacity and output benefited from that.
- **Spanish Language Texting:** We unfortunately had to ask an important question at the end of the project. Was the time and labor put into developing and sending Spanish language texts messages worth it for only 0.28% of the universe? We asked our state and national leads and many said that it wasn't and we decided not to offer Spanish language texting for our GOTV pivot in October 2020.
- **Technology Issues:** Both partner organizations and texters noted, "Occasional platform overloads caused 'texters' to have to wait 20 minutes or more to get started."
  - **Platform Overload:** On multiple occasions during each wave launch the Spoke platform would overload due to the volume of users trying to send texts at the same time.



- **Restrictions on the Number of Texts Requested:** Texters thought they were limited on the number of texts they could request, but the default number could be edited by the texter. This wasn't communicated clearly. At first the default was 50, and then 200, but that was increased.
- **Errors:** Error messages would appear, and texters wouldn't be able to request more messages to send. Texters would get frustrated and impatient.
- **Message Delays:** There were also delays in messages being delivered to target audiences due to huge volumes of texts, which led to recipient responses coming in slower and volunteers no longer available to reply.

Resistance Labs troubleshooted these issues as they occurred, but it is something they ideally would have expected and prepared in advance for each wave due to volume.

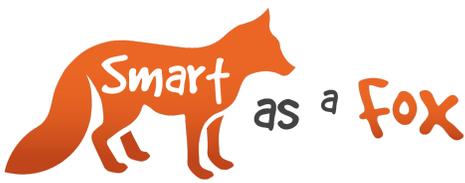
- **Texter Metrics:** State Leads who were running paid texting programs specifically requested a report of the number of texts each of their state paid texters sent. Resistance Labs could not provide this level of detailed report per state and per wave from Spoke. Instead they said they'd be able to produce a large spreadsheet with a list of every texter and the number of texts they sent by the end of each wave. This meant that state leads would need to look for all of their individual texters in a massive spreadsheet of hundreds of texters. This data was also delivered later than requested by Resistance Labs to the state leads. This unfortunately created additional work for the state leads and participating organizations.
- **Less is more.** As we learned from the comparisons to similar U.S. Census outreach campaigns run on different platforms. Those campaigns that sent less messages over a similar period of time performed better overall.
- **Engage.** Those messages we sent that asked a question and prompted a response had far higher engagement rates across the board.
- **Earlier is better.**
  - **Outreach:** We learned that earlier outreach in the Spring which we did for two Link2Tek projects had better engagement than similar outreach done for the COE Project in the Summer and Fall. This could be attributed to targets being inundated with more messages being sent around both Census and GOTV later in the year.
  - **Planning and Strategy:** If only we could go back in time and launch this project in March with full approval in February 2020. If a full proposal had been submitted, reviewed, and approved in February. We could have used March and April for



infrastructure development, process building, content and strategy. Then we would have been able to start onboarding and get stakeholder feedback in April to be able to launch more effectively in May. Message waves would have been in May, June, July, August and September. Instead we ended up needing to build the infrastructure, processes, content and strategy, while onboarding and launching the full campaign at the same time. If something of this scale is attempted in the future a longer runway and earlier start time is recommended.

- **Less top down:** Given the time constraints we were under, the top down approach we had to take ensured that we were able to get out all three message waves to our audiences and meet our 2020 Census Outreach goals. Some state leads took issue with how structured everything was in order to meet those deadlines and would have liked more autonomy. If a similar project of this scale is developed I suggest offering four options to state organizations based on their varied needs:
  - Option 1 - Total Autonomy: At the implementation stage they would be given the option to have the vendor build the Spoke campaign or they could and would have admin access to their Spoke organization. No capacity support would be provided and they would be responsible for the text outreach. They would have free range to text to their target audiences on their own timeline with their own texters.
  - Option 2 - Financial Support: At the implementation stage the vendor would build the campaigns for them. Mini-grants could be made available to help recruit paid texters. No capacity support would be provided and they would be responsible for the outreach. They would have free range to text to their target audiences on their own timeline with their own texters.
  - Option 3 - Capacity Support: At the implementation stage the vendor would build the campaigns for them. Some capacity support would be provided with vendor paid texters and they would be responsible for letting the vendor know the time period they would like that support. They would need to clearly provide a timeline they plan to text to their target audiences with their own texters.
  - Option 4 - Full Capacity: The vendor would build the campaigns and would be responsible for also sending all of the text messages each wave. The organization would simply receive a report back on message and campaign performance.

It is our hope that these learnings would enable us to use and continue to improve upon this infrastructure for future national and state-wide outreach campaigns. Unfortunately, there are major changes happening regarding the future of cold peer-to-peer texting outreach without recipient consent. The carriers have passed new industry-wide rules that will restrict organizations' ability to send text messages from a long code (ie. local 10-digit number or 10DLC) to audiences without an opt-in. These new changes will make large campaigns like the COE Project harder to replicate.



## VIII. Appendices

- I. [Reporting for Census Counts Texting - Final Dashboard](#)
- II. [COE Project Resource Document](#)
- III. [COE Participating Organization Feedback Survey](#)
- IV. [Texter Feedback Survey](#)
- V. [COE Capacity: Participating Groups & State Leads](#)
- VI. [State Capacity Worksheets](#) (Google Drive Folder)

State	State Lead	Worksheet
Alabama	HTC Collaborative	<a href="https://docs.google.com/spreadsheets/d/1iB1FWwMGCxO62-ThmrHijBm2UIkD-0BnTkzZBqWuIY/edit?usp=sharing">https://docs.google.com/spreadsheets/d/1iB1FWwMGCxO62-ThmrHijBm2UIkD-0BnTkzZBqWuIY/edit?usp=sharing</a>
Arizona	One Arizona	<a href="https://docs.google.com/spreadsheets/d/1JzUhV5OXH9BaQlyAIR-VvUHqldZA8Sz6bdC4cAeuLsc/edit?usp=sharing">https://docs.google.com/spreadsheets/d/1JzUhV5OXH9BaQlyAIR-VvUHqldZA8Sz6bdC4cAeuLsc/edit?usp=sharing</a>
Florida	FL Counts & FLCET	<a href="https://docs.google.com/spreadsheets/d/1kAZ9kZFYc_wd0zb09FIRqu6ule7pjWI1CTP-pqI4efw/edit?usp=sharing">https://docs.google.com/spreadsheets/d/1kAZ9kZFYc_wd0zb09FIRqu6ule7pjWI1CTP-pqI4efw/edit?usp=sharing</a>
Georgia	Fair Count & ProGeorgia	<a href="https://docs.google.com/spreadsheets/d/1cvfzXnWQFBdJLG5KSx4rfgAIsqyvm4ihykcA69c2H3g/edit?usp=sharing">https://docs.google.com/spreadsheets/d/1cvfzXnWQFBdJLG5KSx4rfgAIsqyvm4ihykcA69c2H3g/edit?usp=sharing</a>
Louisiana	Power Coalition	<a href="https://docs.google.com/spreadsheets/d/13_GFtgrI57NcQVDELH5LhQQmQIVs9DZMg_s9i1eMRu0/edit?usp=sharing">https://docs.google.com/spreadsheets/d/13_GFtgrI57NcQVDELH5LhQQmQIVs9DZMg_s9i1eMRu0/edit?usp=sharing</a>
Michigan (Detroit)	MI Voice	<a href="https://docs.google.com/spreadsheets/d/15q549Fs7c2fjh7_qOey4cVhoyoGuXgh1jyKSBNoqtmg/edit?usp=sharing">https://docs.google.com/spreadsheets/d/15q549Fs7c2fjh7_qOey4cVhoyoGuXgh1jyKSBNoqtmg/edit?usp=sharing</a>
Mississippi	MS Votes	<a href="https://docs.google.com/spreadsheets/d/1P245uDPXv90bofqB4DPGc3cmJrUXv3fLGXJxImjNLg/edit?usp=sharing">https://docs.google.com/spreadsheets/d/1P245uDPXv90bofqB4DPGc3cmJrUXv3fLGXJxImjNLg/edit?usp=sharing</a>
North Carolina	NC Counts & Blueprint NC	<a href="https://docs.google.com/spreadsheets/d/1_nnATLDPtTyXkdcpgO-QqQet_aClHm0GNP1pJEkfZY/edit?usp=sharing">https://docs.google.com/spreadsheets/d/1_nnATLDPtTyXkdcpgO-QqQet_aClHm0GNP1pJEkfZY/edit?usp=sharing</a>
New York	NYCET	<a href="https://docs.google.com/spreadsheets/d/1QhwR_ePWCuQhaeblgS6CKxII9QuFdlv0H0LONCEV31w/edit?usp=sharing">https://docs.google.com/spreadsheets/d/1QhwR_ePWCuQhaeblgS6CKxII9QuFdlv0H0LONCEV31w/edit?usp=sharing</a>
Ohio (Columbus, Cincinnati, Cleveland)	OH Voice	<a href="https://docs.google.com/spreadsheets/d/1ItormnOHirPPxOBoZyxdq75tO21uXLI4Bd1S7mz90Kg/edit?usp=sharing">https://docs.google.com/spreadsheets/d/1ItormnOHirPPxOBoZyxdq75tO21uXLI4Bd1S7mz90Kg/edit?usp=sharing</a>
Texas	TBC	<a href="https://docs.google.com/spreadsheets/d/1ur8KKXGHJh4ce-epnti-yZDr5MXMCQnE5Rb5p00_Ovs/edit?usp=sharing">https://docs.google.com/spreadsheets/d/1ur8KKXGHJh4ce-epnti-yZDr5MXMCQnE5Rb5p00_Ovs/edit?usp=sharing</a>



## VII. Message Script Copy (English and Spanish)

- A. [Message #1 - Have you completed the census?](#)
- B. [Message #2 - How will you complete the census?](#)
- C. [Message #3 - You still have time to complete the census.](#)

## VIII. [State Lead - Wave 2 & 3 - Pluses and Deltas](#)

### IX. COE Onboarding and Recruitment Materials:

- **State Lead Intro Recruitment Email:** This email was used to begin conversations and schedule one-on-one meetings.
- [Project One-Pager with FAQ](#)
- [Webinar/Slidedeck](#): We held a total of five COE Onboarding Webinars.
- **Post Webinar Email Follow-Up:** This email will be sent to all organizations after the first two webinars asking them to fill out the “COE Organization Participation Form” and a “Texter Participation Form” for organizations to provide to staff and volunteers who would be texting.
- [COE Organization Participation Form](#): This form served as an agreement that the organization will commit to participating in the COE Project. It also had questions regarding texting capacity, staff commitments, and if they have a state specific preference. The form will also ask if they have a list they would like to include in our target universe and a link to an upload form.
  - Response Summary
- [Texter Participation Form](#): This form helped us get all the information we needed from paid and any volunteer texters who were recruited. This is where we will finalize hourly commitments, etc. It will also include a list of weekly trainings for texters to sign-up for before the first message send window.
  - Response Summary
- [Volunteer Recruitment \(PDF\)](#): This document was provided to participating organizations to help them with their texter recruitment.
- [List Upload Form](#): This was simply a way for organizations who would like to have their list added to our target universe. Very few groups took us up on this offer or missed the July deadline set so we could finalize the target lists.