

STREET LEVEL **STRATEGY**

**California Complete Count - Census 2020**  
**California Non-Response / HTC Census Outreach - Final Report**  
**October 19, 2020**

# STREET LEVEL **STRATEGY**

## EXECUTIVE SUMMARY

Street Level Strategy, LLC was initially tasked with conducting outreach in 1,101 HTC Census tracts with approximately 2.8 million households and 1 million phone numbers across California. This program launched on August 15th. On October 2nd, 2020 the scope of work expanded to include an additional 2,914 census tracts for a total of 4,015 tracts with approximately 9,271,513 million individuals, in 4,599,572 million households with 3,885,190 million unique phone numbers. In total, the program was operational for 8 weeks from August 15th to October 14th. This document outlines the results of our outreach efforts along with a summary of the tactics utilized, key observations, and overall learnings.

### **Topline Results**

- A total of 4,015 HTC Census tracts with 3 million households were targeted
- Outreach was conducted by live phone call and text message in English, Spanish, Mandarin, Vietnamese, Tagalog, Hindi, and Korean.
- Over 450 outreach staff operated over an 8-week period.
- 6.6 million phone calls were completed.
- A total of 741,995 households were contacted by phone - a 32.4% contact rate. This was 7 percentage points above initial projections.
- In total, we delivered 200,359 patch-thrus - 169,405 by phone and 33,025 by text message. An increase of 17.6% over our initial projections.
- Over 3.6 million text messages were sent - approximately 2 text messages per number.
- The text message program yielded a 9.1% response rate - 3 percentage points above the industry average.
- 1.3 million live phone calls and text messages were delivered in non-English languages (Spanish, Mandarin, Vietnamese, Tagalog, Hindi, and Korean).

# STREET LEVEL STRATEGY

## **Key Learnings & Recommendations**

- Patch-thru calls proved to be an efficient and effective alternative to in person contact.
- A multi-layered outreach program that includes coordinated and personalized communications using a variety of mediums including direct mail, phone calls, in person contact, and text messaging is ideal to increase awareness and participation.
- An outreach team that reflects the ethnic, racial and geographic diversity of communities dramatically improves outcomes.
- A strategic approach that is centered on building common ground as well as utilizing personal stories and appeals is the most effective with HTC populations.
- Probing individuals who indicated they already completed the Census with questions that ask specifics about how and when they completed was critical to identifying individuals who were likely to not have completed the Census.
- Follow up contacts through text message and phone call were effective in improving completion rates as many experienced long wait times and other difficulties when connecting with the Census Bureau.
- The most effective messaging strategies included:
  - Emphasizing the low completion rate and what that translates to in dollars.
  - Illustrating how much funding can be lost per person with an undercount.
  - Provide real tangible examples of what the funding generated through a single household completing the census could be used for - COVID response, childcare, EBT, healthcare, etc..
  - Sharing personal stories was extremely effective and powerful.
- Common obstacles and negative responses included:
  - Individuals claiming to have already completed the census.
  - “Don’t have time / will do it later.”
  - Concerns about scams or our effort being fraudulent.

# STREET LEVEL **STRATEGY**

- “Doesn’t really matter to me personally.”
- Mistrust of the government.
- Hesitation to share sensitive personal information.
- The short program timeline significantly limited the number of individuals it was realistically possible to contact as well as the overall scope of the program. This program ran for a total of 8 weeks. We recommend a 6-month program at a minimum.
- Time constraints limited the ability to build teams proficient in non-English or Spanish languages. Identifying and training teams proficient in these other languages proved to be more difficult and additional time would be ideal.
- The confirmation/follow-up program was effective. However, as was the case with other aspects of the program, its scope was limited primarily due to time constraints. Overall, contact rates were lower among the confirmation universes. In order to increase the contact rate, we needed more time to complete additional attempts to contact and individual.

# STREET LEVEL **STRATEGY**

## **STRATEGIC APPROACH**

HTC populations are unique and extremely diverse. An analysis of the census tracts with an HTC index above 69 shows that most of these low-response tracts are racially and ethnically diverse (African-Americans, Latinos, Middle-Easterners, Asian-Americans), are low income with a high percentage below the poverty level, do not have access or have limited access to broadband internet, are non-native English speakers, and likely have large immigrant populations. In addition, many within the HTC population harbor an inherent distrust or fear of government, one that has only been stoked by the inclusion of the citizenship question.

Given these circumstances, a successful outreach program requires an approach that is tailored to each demographic and is mindful of their unique situations. As such, the core principle of our approach was assembling an outreach team that consists of individuals who live in the target census tracts, reflect the communities they are working with, and are bilingual. Moreover, our messaging, language, and overall approach took each of these factors into account in order to help build trust with respondents and facilitate meaningful, authentic conversations. This is critical to ensuring that the respondent not only engages with us but follows through with actually completing the census. In short, inauthentic, sterile, and “tele-marketer” type conversations will not produce results. It is only through authentic interactions that are facilitated by real people from the same community as the respondent that our message will resonate and ultimately move people to take action and complete the census.

## **TACTICS**

### **Patch-Thru Calls**

The primary outreach tactic utilized was the patch-thru phone call. Every resident in our universe received a live phone call as the initial contact. Once outreach specialists were able to secure a commitment to complete the Census, we then patched the respondent through to the US Census Bureau to complete the census on the spot.

### **Text Messaging**

Text messaging was used to make initial contact as well as a follow up tool. As was the case with phone calls, text messages were sent in multiple languages. When used as an initial contact we followed the text with a phone call one to two days afterward.

# STREET LEVEL **STRATEGY**

As a follow up tool, text message under the following circumstances:

- 1) An individual declined to be patched thru to the US Census Bureau and indicated they will complete the census on their own. At this point, we sent a text message with a link to complete the census and a message of encouragement on the spot.
- 2) As a follow up to individuals who indicated they will complete the census or that were patched thru to the US Census Bureau.

## **Follow up confirmations**

As described above, we placed confirmation calls and text messages to individuals we had patched-thru by phone or indicated they would complete the census via text message conversation with our team. Confirmation calls provided the opportunity to help individuals who experienced difficulties, identify external issues that contributed to an individual not completing the census, and also solicit feedback from individuals in order to improve the program.

## **Multi-Language and Multi-Ethnic Outreach**

Our program featured outreach in multiple languages including Spanish, Korean, Mandarin, Hindi, Vietnamese, and Tagalog. This provided us the ability to communicate with diverse communities throughout the state and dramatically improve our ability to improve response rates among non-English speaking populations. Additionally, we were able to recruit staff members who spoke the regional variations of Spanish, such as commonly spoken Spanish in Ecuador, El Salvador, and Mexico.

## **Geographical Diversity**

A key element of our approach was to assemble a team of outreach specialists who reside in or have a personal connection to the communities we would be working with. This was fundamental to a messaging and persuasion strategy that relied heavily on personal appeals based on the experience or situation of a particular community and the ability of an outreach worker to relate to and build credibility with an individual we were contacting. Outreach specialists who lived in or were from the community they were working with were dramatically more effective in generating census completions.

## **Personal Stories and Creating Common Ground**

A central component of our approach was building common ground and making personal appeals to help persuade individuals to complete the census. As described in the section titled "Geographical Diversity," the ability to effectively appeal to an individual on a

# STREET LEVEL **STRATEGY**

personal level was necessary to persuade individuals who were skeptical, mistrustful of the census, did not understand the importance of the census, or simply were not likely to take the personal initiative to participate.

## **Quality Control & Training**

Maintaining a high-quality work product was a top priority. Moreover, because we did not have the ability to independently verify if an individual completed the census, we put robust quality control measures in place to ensure that individuals who were patched-thru by staff agreed to. Quality control measures included ongoing analysis of patch-thru and contact rates as well as overall production, real time monitoring of phone conversations by supervisors, and constant coaching and training with staff. In addition, each team began and ended a work shift with a briefing that included the sharing of best practices, workshopping how to overcome obstacles, and role plays to model various scenarios and how to successfully navigate through.

## **DATA & TARGETS**

The quality of the data that we acquired to conduct outreach had positive and negative impacts on the program. We utilized a combination of registered voter data and consumer data to build universes of all individuals, regardless of their citizenship or voter registration status, in each target tract. In total, our universe across all 4,015 tracts included 9,271,513 million individuals, in 4,599,572 million households with 3,885,190 million unique phone numbers. Due to the fact that our program was limited to outreach by phone or text message, we narrowed our universe down to households with at least one phone number associated with it. This brought the universe total down to 5,178,707 million individuals, in 3,086,824 million households, with 3,778,719 million phone numbers.

The quality of the phone numbers was the biggest obstacle for the program. Ultimately, we identified approximately 1,022,344 million bad phone numbers (disconnected, incomplete, fax machines, incorrect, etc...) or 27% of the total universe. This brought our total universe of working phone numbers down to approximately 2,756,375, which represented 2,284,249 households and 3,656,167 individuals. The amount of bad numbers not only reduced the size of the overall universe, but also had a negative impact on productivity.

# STREET LEVEL **STRATEGY**

However, beyond the quality of the phone numbers, the quality of the data in terms of who resided in each household had an 82% rate of accuracy. We consider this to be acceptable given that approximately 60% of the universe was composed of non-registered voters.

Additionally, our lists included data points of language preference, age, sex, education, income, race, ethnicity, as well as other lifestyle data that allowed us to tailor our messaging and approach to each individual. This undoubtedly contributed to our success in moving individuals we made contact with to complete the Census.

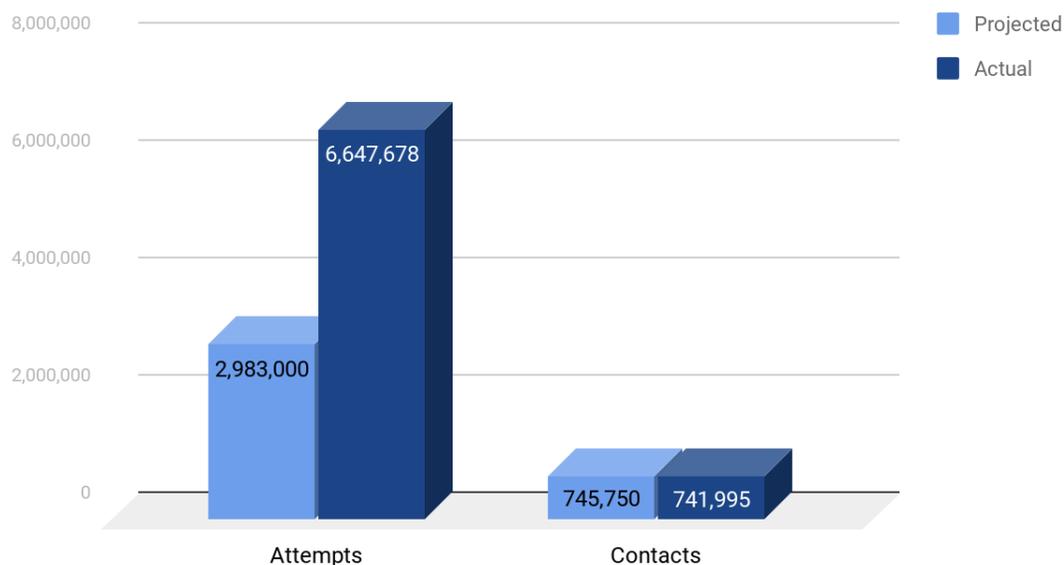
## **SUMMARY OF DELIVERABLES**

### **Attempted Contacts by Live Phone Call**

As described above, the core tactic utilized in this program was the “patch-thru” phone call. Our initial goal was to complete 2,983,000 phone calls to 1,172,032 individuals in target tracts and make contact with 745,750 households at a contact rate of 25%.

We were ultimately able to exceed the projection of phone calls placed (attempts), completing 6,647,678 calls to 2,756,375 phone numbers representing 2,284,249 households and 3,656,167 individuals.

Phone Calls - Projected vs. Actual



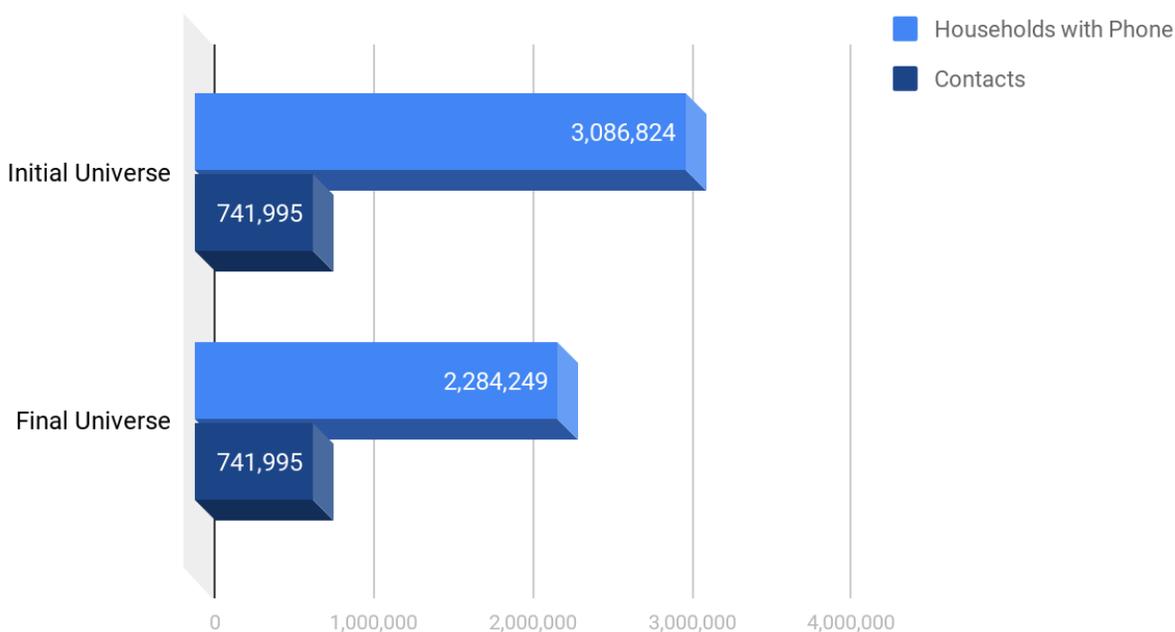
In terms of contacts made, the program ultimately yielded a 32.4% contact rate with a total of 741,995 households reached among the entire universe of 2,284,249 million households. The 32.4% contact rate exceeding our initial projection of 25% by 7

# STREET LEVEL STRATEGY

percentage points. The numbers of actual contacts made and attempts account for the slightly over 1 million bad phone numbers we removed from the overall universe.

Despite an increased contact rate, the program did fall short of 745,750 the projected number of contacts. However, this projection was based on the initial universe of 2,983,000. After identified and removing bad phone numbers, the final universe reduced in size. As such, reaching the initial contact goal of 745,750 would have required a 32.6% contact rate.

## Contact Rate - Initial Universe vs. Final Universe



While our contact rate exceeded projections when accounting for bad phone numbers, we believe that a program of greater length would have yielded a higher contact rate. Given that these households are more difficult to contact and there are a number of barriers to eliciting their participation in the census, multiple contact attempts are an absolute necessity in order to increase the odds of reaching an individual. The program timeline and budget allowed for approximately two attempted phone calls per number. We had initially planned for three to four attempts, however, the addition of 2,914 tracts on October 2nd made it unrealistic to complete three to four passes of the entire universe. Yet, we prioritized individuals in HTC tracts with an index of 69 and those households received three attempts by phone.

# STREET LEVEL **STRATEGY**

## **Attempted Contacts by Text Message**

We utilized text messaging in two ways: 1) as a follow up with individuals who we patched thru over the phone to confirm they completed the census as well as to help address any challenges they encountered. Text messages were also used to follow-up with individuals who asked callers to send a link to the census via text. 2) An initial contact tactic that complimented live phone call attempts to individuals we had not made contact with previously.

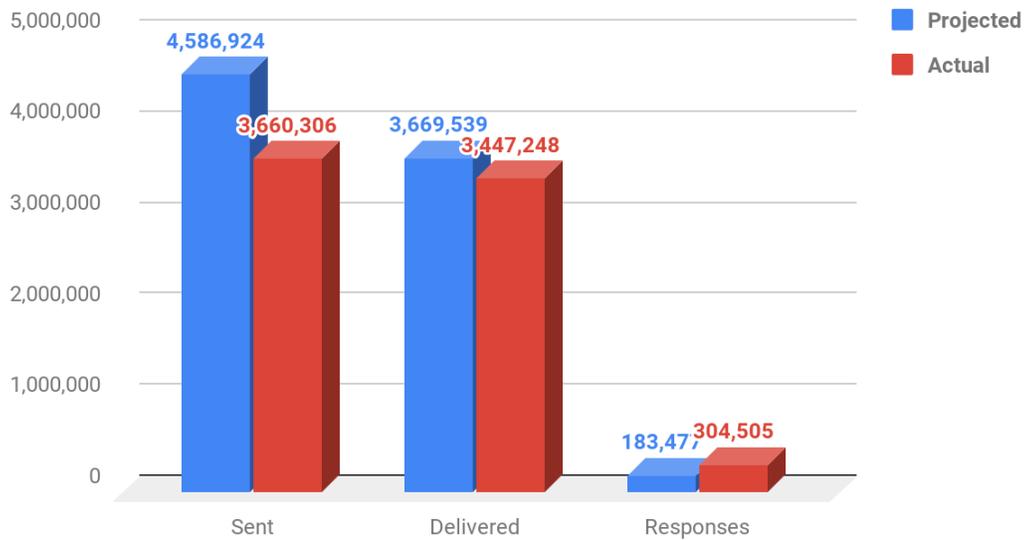
The overall universe consisted of 2,293,462 mobile numbers representing 1,873,634 households. When accounting for bad numbers, the total universe dropped to 2,080,404 working mobile numbers representing 1,723,743 households. In total, we sent out approximately 3,660,306 million messages of which 3,447,248 were successfully delivered. This breaks down to approximately 2 messages per number.

In addition, we also broke down the universe by language, sending and responding to text messages in Spanish, Mandarin, Vietnamese, Korean, Hindi, and Tagalog.

The text program was an interactive two-way messaging program. After an initial message was delivered, our outreach team would respond to individuals who replied. Overall, we experienced a higher than expected response rate. In our experience, the typical response rate is approximately 6%. However, we enjoyed a 9.1% response rate in this program. It is difficult to pinpoint what factors contributed to the increased rate. We speculate that the nature of the subject matter as well as the messaging strategy account for the increase as individuals maybe more likely to engage in comparison to a message that is political or commercial in nature.

# STREET LEVEL STRATEGY

Text Messages - Projected vs. Actual



## Delivered Patch-Thrus

In total, we delivered 200,359 patch-thrus - 169,405 by phone and 33,025 by text message. This represents an increase of 17.6% over our initial projections. The program delivered 20,255 additional phone patches over projection (13.6% increase) and 11,940 additional patches by text over projection (56.6% increase).

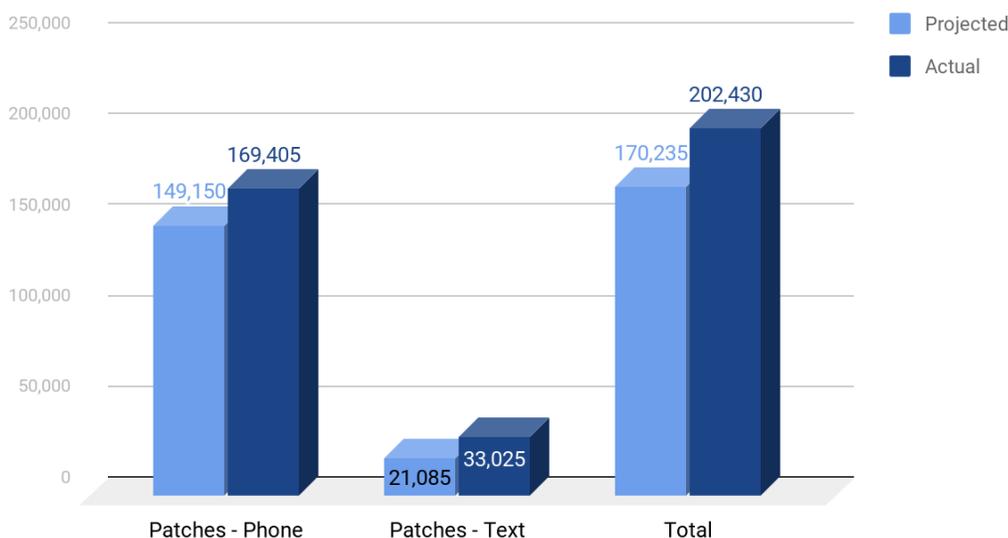


Because our program was unable to obtain data on which individuals completed the census (due to legal restrictions), we incorporated a follow-up program designed to confirm with

# STREET LEVEL STRATEGY

the individual that a patch thru was completed. There were limitations to this program. First, despite two to three attempts, we were only able to successfully reach 14.1% of individuals who we patched thru on the phone. We attribute this primarily to fatigue on the individual's behalf. Second, we had no independent verification of the individual's affirmation that they completed the census. Again, due to data limitations imposed by legal restrictions, we were limited to relying on the individual's response. With these significant limitations in mind, 80% of those we reached confirmed the completed the census. The remaining 20% indicated they did not complete the census most commonly cited long wait times on the phone, technical issues, or lack of time.

Patches - Projected vs. Actual



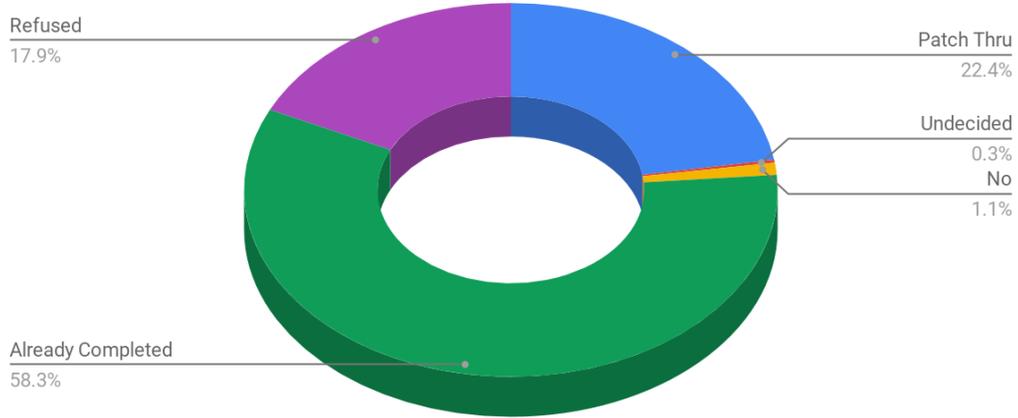
## Responses

In total we made 741,995 contacts by phone. As the chart below demonstrates, the majority (58.3%) indicated they had already completed the census, while 22.4% were ultimately patched thru to the Census. This represents an increase of 2.4 percentage points over our initial projection of 20%. Only 1.1% of individuals indicated they would not complete the census, 0.3% were undecided on doing so, and 17.9% refused.<sup>1</sup>

<sup>1</sup> Refusals are individuals who were hostile or demanded to be removed from the list.

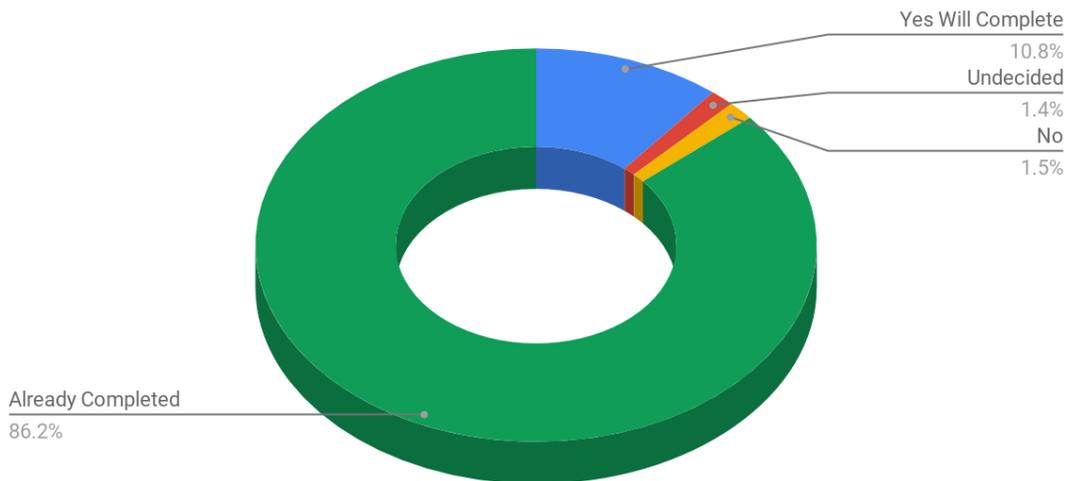
# STREET LEVEL STRATEGY

## Phone Responses - 741,995 Total



The text message portion of the program resulted in 86.9% indicating they had completed the Census and 10.2% agreeing to complete the census and receiving a link to do so online. Only 1.3% were undecided and 1.5% indicated they would not complete the Census.

## Text Responses - 304,505 Total



## Non-English Text and Phone Calls

# STREET LEVEL STRATEGY

Outreach in Spanish, Mandarin, Vietnamese, Tagalog, Korean, and Hindi was also conducted by phone and text message. In total, 1,355,028 calls and texts were made in these languages. Within that total 685,794 calls were made and 669,234 text messages sent.

Contact, response, and patch-thru rates varied significantly from the entire universe. Phone communications yielded a 9.4% contact rate, significantly below the 32.4% rate for the overall program. However, in the non-English universe, 42.9% of contacted individuals patched-thru versus a rate of 22.8% overall. Text messaging yielded a 6.9% response rate and a 15% patch rate. By comparison, the entire text program yielded a 9.1% contact rate by text message and a 10.2% patch rate.

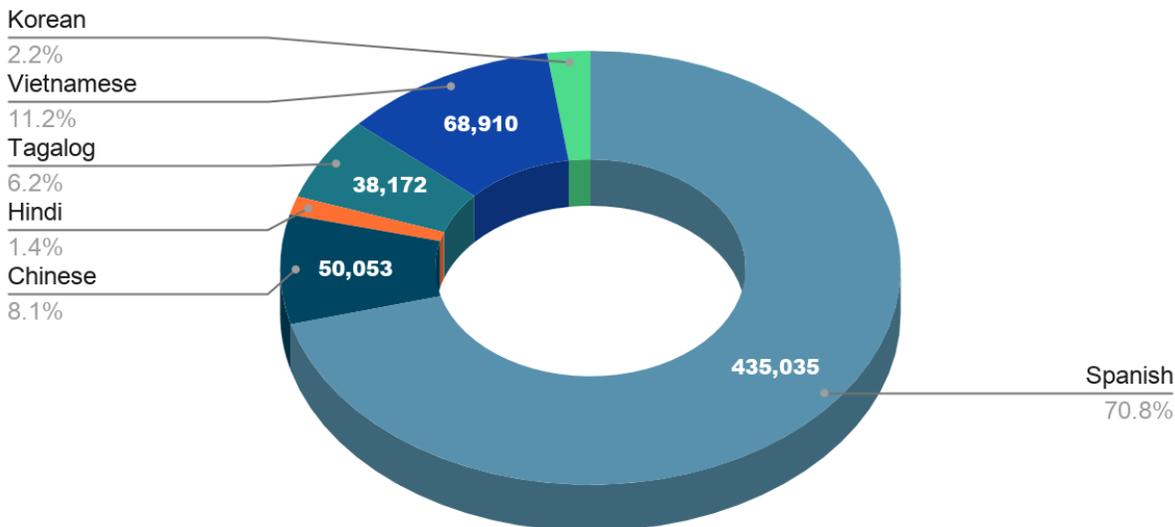
While non-English speaking populations were undoubtedly more difficult to contact, the patch-thru rates over indexed, with phone communications proving to be particularly effective.

From an operational perspective, text messaging proved to be a more efficient method to reach non-English and non-Spanish speaking populations. The main factor driving this was difficulty in building a staff proficient in the other languages of the necessary size in order to make a phone program efficient. We were able to accomplish this with English and Spanish speaking outreach teams, but not with the other languages. As such, we relied

primarily on text messaging to contact Mandarin, Tagalog, Hindi, Korean, and Vietnamese speakers, a method that requires a smaller amount of outreach staff. However, while phone communication was not a fully scaled tool with these languages, individuals who responded to text messages did receive a follow-up call in their preferred language.

# STREET LEVEL STRATEGY

## Text Messages Delivered

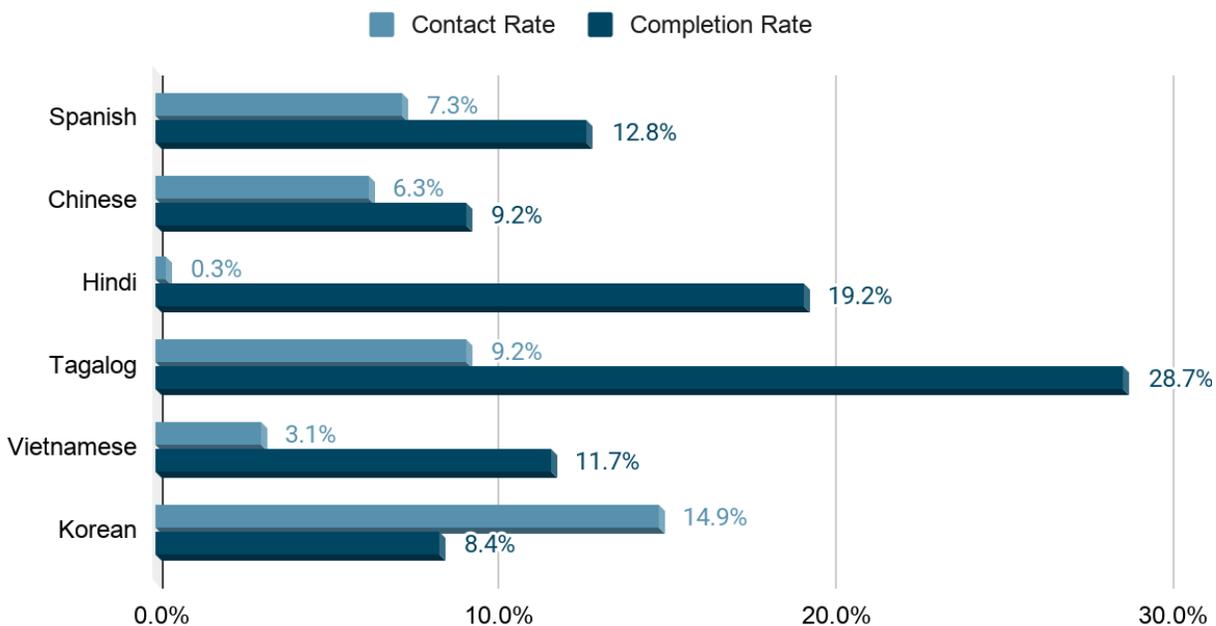


The text message response rates among the non-English language populations varied widely. Korean and Tagalog speakers had the highest response rates at 14.9% and 9.2%. Spanish speakers followed at 7.3% with Chinese at 6.3%, Vietnamese at 3.1% and Hindi at 0.3%

The rates of patch-thrus or individuals agreeing to complete the census also varied significantly. Among individuals who we made contact with, 28% of Tagalog speakers, 19% of Hindi, 12.3% of Spanish, 11.7% of Vietnamese, 9.2% of Chinese, and 8% of Korean speakers agreed to complete the census.

# STREET LEVEL **STRATEGY**

## Contact and Completion Rate - Non English Text



## **LEARNINGS**

### **Tactics**

#### **Patch-Thru Calls**

Given the once in a lifetime circumstances in which we were operating, an outreach program that relied on patch-thru calls as the core tactic, was the best available option for outreach. The patch-thru call offered a number of advantages:

- **Efficient contact method:** An extremely efficient way to reach a large amount of people in a short period of time. In fact, we were able to have conversations with nearly 750,000 households and made over 6.6 million phone calls in 8 weeks. This is the only communication medium that yields such a high volume of interactive conversations.
- **Personalized and tailored messages:** Unlike earned or paid media (television/radio ads, direct mail, digital, news articles, etc...) phone calls provided an opportunity for outreach specialists to tailor messages to each individual. Outreach specialists engaged an individual, listened to their

# STREET LEVEL STRATEGY

thoughts, and responded in a manner that not only addressed those concerns, but dramatically increased the likelihood of completing the census.

- **Increased awareness among individuals less likely to see or pay attention to advertising:** Despite months of advertising and news around the census, many individuals did not understand the importance of completing the census prior to our calls or were even aware that it was time to complete the census. The personalized contact helped reach and persuade individuals with whom paid media had little impact.
- **Increased likelihood of completing the census:** The patch-thru was an excellent way to pressure a voter into completing the census immediately. This option made it more difficult for the individual to put off completing the census or provide another excuse such as not having enough time or having misplaced the census ID.

## **Confirmation calls**

In addition to the patch-thru calls, we also used phone communication to make confirmation calls to individuals who agreed to be patched through. The confirmation calls proved to be critical to increasing the patch thru rate. Through these calls we learned that many individuals had not completed the census because of long wait times. More often than not they would agree to be patched thru and try again. It also allowed us to make an additional pitch to the individual to encourage friends, family, neighbors, etc... to complete the census.

The biggest negative or limiting factor here was the contact rate. The confirmation call contact rate was only 4% - a 28.4 percentage point decrease from the overall initial contact rate. We tried a number of things to increase the contact rate including changing the caller ID number and calling during different times of the day. Ultimately, if we did not reach someone after the second or third try our agents would leave a voice message with a call back number if they needed any assistance. We have concluded that additional time and a larger staff to complete confirmation calls is most likely the most effective way to increase the contact rate.

# STREET LEVEL **STRATEGY**

## **Text Messaging**

Text messaging was used in a number of ways including 1) making an initial contact with an individual, 2) a real-time communication tool with people we were speaking with over the phone, 3) as a follow-up tool.

**Text messaging during a live call:** The ability to send a text message to an individual during a live call was an extremely useful tool among those reached by cell phone. A common answer to completing the census was that they had already done so, didn't have time to be patched thru, or were simply adamant about not patching thru. While we were not able to collect data on the number of individuals who clicked on the link they were sent, we presume that the ability to send a text message most likely helped improve participation.

**Text as the initial contact:** While the response rate of 9.1% in our program was above industry standards, it was significantly lower than the phone call which stood at 32.4%. However, we found that sending a text message prior to attempting a contact by phone was advantageous for two primary reasons. First, it was a low-cost way to "clean the list" by identifying bad or disconnected phone numbers. As discussed previously, removing these numbers prior to making phone attempts improved our efficiency and ultimately lowered costs on the phone program. Secondly, we believe it improved our patch-thru rates. Individuals who had been sent a text often reported receiving one. Some indicated they completed the census based on text message, while others were much more receptive to engaging with us and agreeing to be patched-thru.

## **Multi-Language and Multi-Ethnic Outreach**

Our program featured outreach in multiple languages including Spanish, Korean, Mandarin, Hindi, Vietnamese, and Tagalog. This provided us the ability to communicate with diverse communities throughout the state and dramatically improve our ability to improve response rates among non-English speaking populations. Beyond the practical advantages of conducting outreach to these individuals in their preferred language, this also helped foster credibility and trust among the communities we were contacting. Additionally, we were able to recruit staff members who spoke the regional variations of Spanish, such as commonly spoken Spanish in Ecuador, El Salvador, and Mexico.

# STREET LEVEL **STRATEGY**

We see multi-language outreach as a necessary and vital component of programs targeting HTC communities. Given the tight timeline of our program, we were limited in our ability to recruit and train more outreach specialists with proficiency in each of these languages and were not able to onboard staff who spoke Hmong, Arabic, and other languages.

Another successful tactic was building an outreach team that reflected the ethnic and racial diversity of the communities we were working with. Our team included African-American, Latinx, and Asian Pacific Islander team members. This gave team members the ability to build common ground with individuals and make appeals on a more personal level.

## **Geographical Diversity**

Assembling a team that was primarily composed of individuals from the communities we were working with was also a major advantage. Moreover, we organized outreach in a manner that ensured that an outreach specialist was contacting a community they also resided in or had a personal connection to. This was an absolutely critical element to fostering an outreach strategy that relied heavily on personal appeals based on the experience or situation of a particular community and the ability of an outreach worker to relate to and build credibility with an individual we were contacting. Outreach specialists who lived in or were from the community they were working with were dramatically more effective in generating census completions.

However, time constraints also limited our ability to ensure that a community was only contacted by outreach specialists with a direct connection to that community. While this was a tactical imperative, in order to meet contact goals, we had to assign staff to communities they were not directly connected to. Yet, this model has proven to be scalable and with the appropriate amount of time to recruit, hire, and train staff we are confident that this model could be applied to the entire program.

## **Recommendations - Tactics**

- **Multi-layered outreach programs are essential.** The use of text messages as both a follow-up and precursor to the phone call proved to be effective in raising awareness of the census as well as increasing the likelihood of an individual engaging with us over the phone. We believe an expanded program that also incorporates personalized direct mail and digital advertising will increase response rates. We understand that outreach efforts utilized during this census included extensive earned and paid media strategies. However, we propose a paid media program that is closely coordinated with direct outreach efforts like phone calls, text messaging, and canvassing as well as well-timed in order to maximize results. Delivering a generic piece of mail that is not

# STREET LEVEL **STRATEGY**

coordinated with direct outreach programs is not as effective as a coordinated program. In this instance an individual may receive a direct mailer with their personal information featured, a text message, and then a follow-up call or door knock all within a week. Each communication builds upon the other and their close proximity ensures that the individual is the subject of direct outreach (phone call or door knock) at the time where awareness of the census may be at the highest point.

- **An outreach team that reflects the ethnic, racial and geographic diversity of communities dramatically improves outcomes.** A hallmark of our strategic approach was building outreach teams that reflected the diversity of the communities that we were working with. In practical terms, this meant Central Valley residents reaching out to the Central Valley, Latinx outreach workers reaching out to Latinx communities, and Vietnamese speakers contacting other Vietnamese speakers, and so on. This was critical to not only building common ground with individuals, but also communicating in their language, tailoring our approach to be culturally appropriate, and lending outreach workers credibility. This last point is especially important. In working with HTC communities our biggest challenges were convincing individuals that the census impacted their lives personally and that it was safe.

Future programs must continue to make each of these elements a priority. However, building diverse and highly skilled outreach teams takes time. Training is another essential component of a successful program. In many ways, the extremely short eight-week timeline for the program made it exceedingly difficult to build a team that checked all of these boxes. Ultimately, we did not have enough outreach workers proficient in many Asian languages and were completely deficient in others. However, we are confident that with an appropriate amount of time, it is absolutely possible to build a team that is capable of conducting effective outreach to every single community in California.

## **Operations**

### **Remote operations**

Due to the pandemic, we conducted the entire program remotely. Everything from recruitment and training to daily work shifts and management meetings were done via zoom and from home. This system worked surprisingly well, with few downsides, and a number of advantages.

Remote operations allowed us to save resources we would otherwise have spent on rent, utilities, and other costs associated with leasing and managing multi office locations. We

# STREET LEVEL **STRATEGY**

also had greater flexibility in regard to hiring and scaling the program was easier. Because we did not have physical work locations we recruited and hired staff from every corner of the state. This made scaling up operations easier and faster than normal. It also provided a greater ability to build diverse teams and recruit staff from each community we worked with. Ultimately, we had over 400 outreach workers on staff throughout the state.

## **Management structure**

Remote operations did necessitate additional management staff. A typical manager to staff ratio would be 15 to 1. However, monitoring, managing and coaching 15 individuals at the same time remotely is extremely challenging. We did not want to compromise quality control or the ongoing coaching and training we do with staff. As such, we expanded management staff to achieve a 8 to 1 ratio. We found this to be the optimal ratio. Conversely, a larger number of managers and smaller manage to staff ratio was necessitated due to the rapid expansion of the program. We would train and onboard an average of 50 staff per week. Naturally, new staff members required more training and attention from managers than more seasoned staff.

## **Daily briefings and management meetings**

Our routine of daily briefings to begin a work shift and debriefings at the close of a shift were critical to sharing best practices and collecting feedback from the outreach team. We view training as an ongoing process and foster an environment where continual development of outreach tactics, modifications in messaging, and overall approach are encouraged based on feedback from the field.

The large size of the team made it critical that we created as many opportunities as possible for team managers to interact with each other in order to share best practices, collaborate, and also be plugged into the overall progress of the program. Senior management was in communication on a daily basis, however, we held twice weekly meetings between team managers who were directly responsible for outreach workers.

## **Coordination with California Complete Count**

Street Level Strategy maintained constant communication as well as data sharing with California Complete Count staff throughout our program. This included weekly phone conferences to review the overall progress of the program, identify best practices, discuss goals for the coming week, and to trouble shoot operational challenges. In addition, we provided daily written reports, weekly work summaries, and comprehensive bi-weekly progress reports that we accompanied with raw data files that contained the results of our outreach work.

# STREET LEVEL STRATEGY

Regular communication and data sharing were critical in order to continually improve the program from a messaging perspective as well as modify targeting priorities based on real-time Census completion data, developments on the ground, and the overall progress of the program.

## **Messaging**

Throughout the program we continually worked to improve and refine messaging based on feedback from the field as well as a daily analysis of data. The following section summarizes key learnings:

**Overall themes and messaging:** \_In general, messaging that focused on the low completion rate in a particular community coupled with tangible and practical examples of the impact of the census count on spending for programs proved the most effective approach. The least effective talking points were those focused on reapportionment and representation.

### **Effective Messages:**

- Emphasizing the low completion rate and what that translates to in dollars.
- Illustrate how much funding each household is worth.
- Illustrate how much funding can be lost per person with an undercount.
- Provide real tangible examples of what the funding generated through that single household completing the census could be used for - COVID response, childcare, EBT, healthcare, etc...
- Sharing personal stories was extremely effective and powerful when coupled with a real-world example of what census funding would mean. Ex: "I'm a mother and just like every parent I know how important pre-school and childcare is. The \$1,000 a year completing the census is worth would go a long way in funding childcare for one kid."
- Providing examples of local programs that receive block grant funding.

### **Ineffective Messages:**

# STREET LEVEL STRATEGY

- Discussing the importance of the census for reapportionment and fair representation. Many individuals were skeptical of and pessimistic of government and politicians.
- Focusing on completion of the census as a civic duty had little impact in motivating individuals.

## **Message Recommendations:**

- Personal stories and the ability to provide real tangible examples of how census funding could be used or what a loss would mean is critical.
- Arming outreach specialists with more data points specific to each community.
- Big picture data points or messages about the census are not persuasive. Messages such as “the census is used to distribute over \$675 billion” are less effective than “the census is used to determine how much funding South LA gets for programs like head start and the boys and girls club.”

## **Messaging strategies to overcoming resistance**

Despite contacting hundreds of thousands of individuals, we often came across the same set of concerns or reasons for not participating in the census. The following are the most common responses along with the percentage of the total contacts that provided a given response.

- Already completed the census – 59.4% of contacts
- Don't have time / will do it later – 2% of contacts
- Privacy Concerns - Concerns about our effort being fraudulent / mistrust of government / not comfortable sharing personal information – 3.4% of contacts
- Refused to participate / doesn't really matter to me personally – 12.4% of contacts

# STREET LEVEL **STRATEGY**

*Already completed the census:* This was by far the most common response and a challenging one to overcome. Without the ability to verify whether or not a person actually completed the census, we took an approach that did not disregard their assertion, while asking probing questions to help verify completion while also setting the stage to encourage them to complete the census once again to be absolutely certain.

Once an individual indicated they had completed the census, we would ask follow-up questions such as:

- Did you receive / do you have your confirmation code?
- How did you complete the census?
- When did you complete the census?

Each of these questions would often be met with an inaccurate or unsure response. The most effective strategy was to ask if they received a confirmation code. More often than not individuals would respond that they had not or could not remember. At this point, we would encourage an individual to be patched through. We would emphasize the following talking points:

- *If completed by mail:* Due to the pandemic, there have been slow downs with the postal service, it is best to complete it once again to be sure.
- *If completed online:* It is best to complete it by phone. Problems with internet service or other technical issues could have caused your survey to not be received.

If an individual was adamant they completed the census, but could not produce a confirmation code or provide details of how it was done, we would push them to be patched-thru. Our team would also emphasize that they would not be counted twice and that if they indeed did complete the census successfully, it would be on record and they would be informed by the enumerator.

*Don't have time / will do it later:* This was also a common response and the most difficult to overcome. Individuals who responded this way were more often than not simply attempting to end the phone call. Common tactics to overcome this response included:

- Explaining that it would only take 5 minutes.
- Highlighting that the census is once every year - that is 5 minutes of their time every 10 years.

# STREET LEVEL STRATEGY

- Offering to schedule a call back time.
- Highlighting the importance of the census.
- Providing a link via text message.

*Privacy concerns:* Privacy concerns were particularly common among older populations and individuals whose primary language was not English. The concerns ranged from questions about the credibility of our callers to what the information would be used for. Overall, these concerns were dispelled using the following message points:

- Clarifying our role in that we are a project of the state of California and are not enumerators with the Census.
- Explaining that once they are patched through to an enumerator we disconnect and are barred by law from listening to the conversation.
- Informing individuals of their right to ask for the badge number and identify of the enumerator.
- Citing the government code protecting their privacy and the penalty for violating it.

*Overall apathy / doesn't affect me:* This was also one of the most difficult responses to overcome. We utilized personal appeals, localized examples of the impact of the census, and made altruistic appeals. There wasn't a clear set of messages that were effective with individuals who responded this way. In our experience, this was another common response from individuals who had very low interest in the Census and were not open to persuasion.

## **External Factors**

### **Census Bureau Impacts on Completion**

During our follow-up calls to individuals we had patched-thru to the Census Bureau, we identified a number of issues with their operation that hindered participation. The two most common issues were wait times on the phone and misinformation.

It was commonly reported that individuals would wait upwards of 10 minutes for an enumerator. This was a major hindrance to completion and made it extremely difficult to persuade an individual to attempt to complete the census a second time.

# STREET LEVEL **STRATEGY**

Many individuals also expressed skepticism about the validity of our efforts after being patched-thru to the census. Once they indicated to an enumerator that they had been patched-thru the enumerator would inform them that the census is not doing patch-thru calls, which naturally raised concerns.

Both of these factors significantly impacted our ability to truly convert our strong contacts into census participation, with wait times, which were a consistent issue, mostly likely having the biggest negative impact.

## **Timeline**

As discussed throughout this report, the short timeline had a major impact on nearly every aspect of the program. We strongly recommend that future programs have an operational timeline of six months at a minimum. Ultimately, a longer timeline will allow time to scale up a program, build a larger outreach team, improve training and outreach, and most importantly, provide more opportunities to reach more individuals.