



# **2022 Political Tech Landscape Report**

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# Introduction & Background

Voters showed up and showed out in the 2022 midterms. Despite gloomy predictions from pundits, Democrats were bolstered by a better-than-predicted performance. This is an affirmation of the Biden administration's focus as well as a rejection of far right extremism. Midterm turnout affirms the importance of long-term organizing in constituent communities and powerful mobilizing to counter ongoing conservative extremism.

Campaigns and organizations continued to adapt to a hybrid of virtual and in-person techniques that produced historic contact records. Voter suppression and 2020 election deniers presented onerous challenges in 2022, with active efforts to attack vote-by-mail, close polling places, harass nonpartisan election administrators, and spread misinformation in Arizona, Georgia, Florida, and beyond. Technology is playing an increasingly important role in supporting coordinated responses to attacks on democracy, from refining message development to enhancing on-the-ground organizing to informing and protecting voters.

Two other notable trends impacting the use of technology include a major spike in ad pricing this cycle (just as streaming TV starts to outpace regular TV viewership) and an increasing decentralization of digital social networks. These forced operatives to adapt new engagement strategies and spend advertising dollars more efficiently - both aided by better technology.

Finally, as the political technology ecosystem matures, we see increasing needs for infrastructure improvement in two vital areas: data infrastructure and talent management. As game-changing new initiatives such as the Democratic Data Exchange (DDx) and innovative new data warehousing structures like the DNC's Phoenix continue to expand their footprint, opportunities to better leverage data that improves the end-to-end voter experience are finally here. Improvements surrounding integrations, data portability across tools, and optionality of voter data sources are increasingly important. Changing data infrastructure across an entire industry is not for the faint of heart, but the juice here is worth the

squeeze. While innovation in campaign tech has had a significant impact over the past three cycles, there is more to do to recruit, train, and retain the diverse, talented people who power our movements with enhanced compensation, management, and career growth opportunities.

Today we are focusing our efforts on the 2024 cycle. With a polarized electorate, extreme candidates on both sides, an uncertain economic environment, and new technological frontiers like AI — there is a lot of work to do. We hope this report offers a succinct view of the progressive technology landscape that can be used as we prepare for the work ahead. Thanks, as always, to the incredible team of researchers and writers who crafted this report and the many contributors who shared their experience. We are building something important together. Let's use this to push forward.

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**Betsy Hoover**

Co-Founder, Managing Partner: Higher Ground Labs



# Executive Summary



## **Campaigns flock to streaming services as more begin to accept political ads**

Policy changes on popular platforms shake up the advertising landscape, leading to price spikes and a 15x increase in campaign spend on TV, including connected TV, just as streaming services are projected to surpass traditional TV viewership rates.



## **Influencer marketing achieves institutional adoption**

From the DNC to national advocacy organizations, major players across the space deploy both paid and unpaid influencers to deliver compelling messages to voters online.



## **Political text messages reach a tipping point**

Declining contact rates, complex 10DLC carrier policies, oversaturation, and scams push practitioners to rethink the role of text messages.



## **Campaigns are starting to purchase their tech earlier**

HGL's 2022 Buyers' Survey reveals that campaigns are beginning to engage with tech vendors earlier in the cycle compared to 2020, with 37% now doing so one year ahead of Election Day.



## **Tech improves at the downballot level but campaigns still lack an affordable and effective stack**

Downballot campaigns experience unprecedented electoral success, but despite improvements in tech offerings, many still cannot access basic tools.

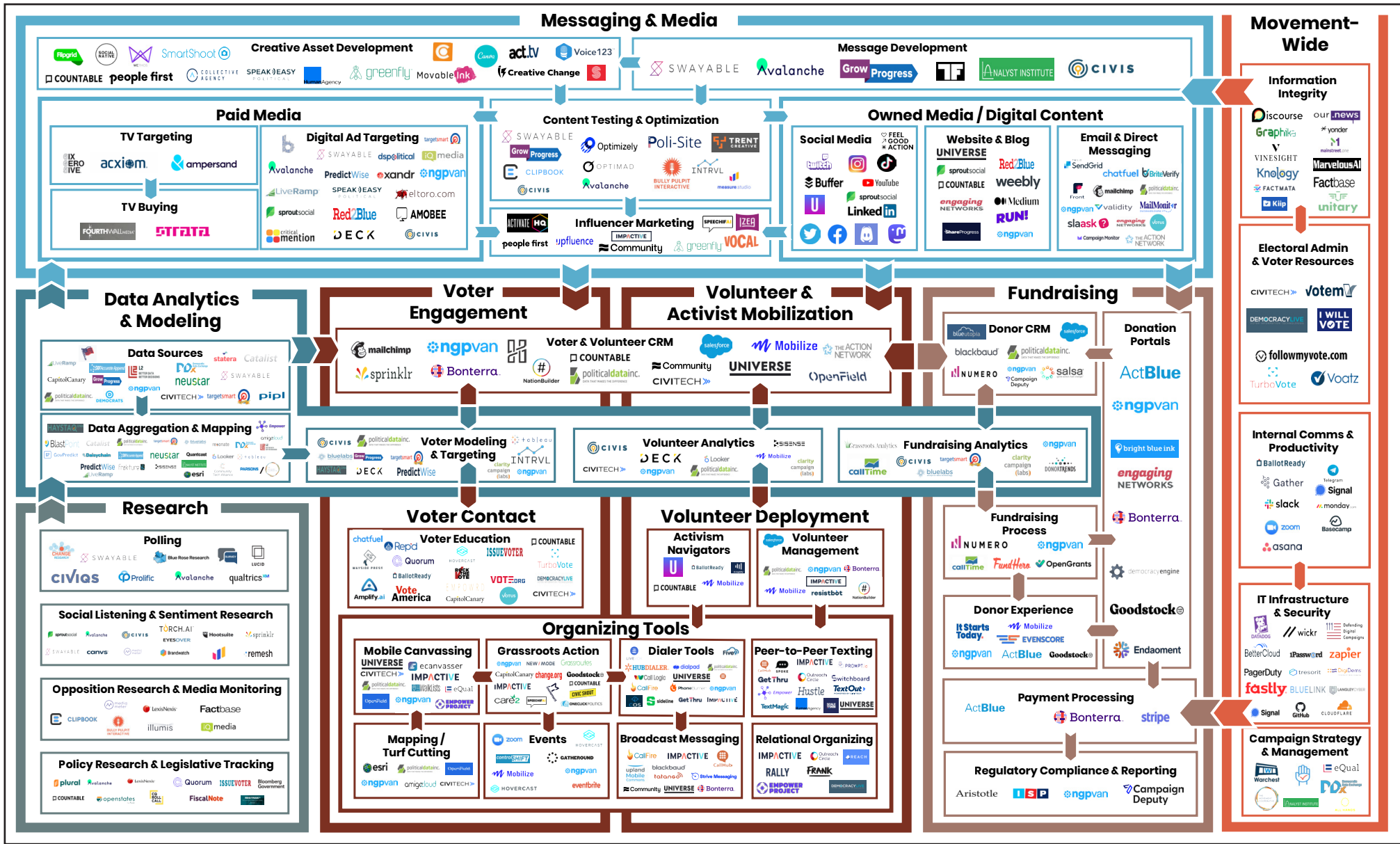


## **Large M&A activity of key infrastructure raises questions among practitioners**

NGP VAN's acquisition by Apax Funds and consolidation into Bonterra creates uncertainty regarding the future of core voter data infrastructure.

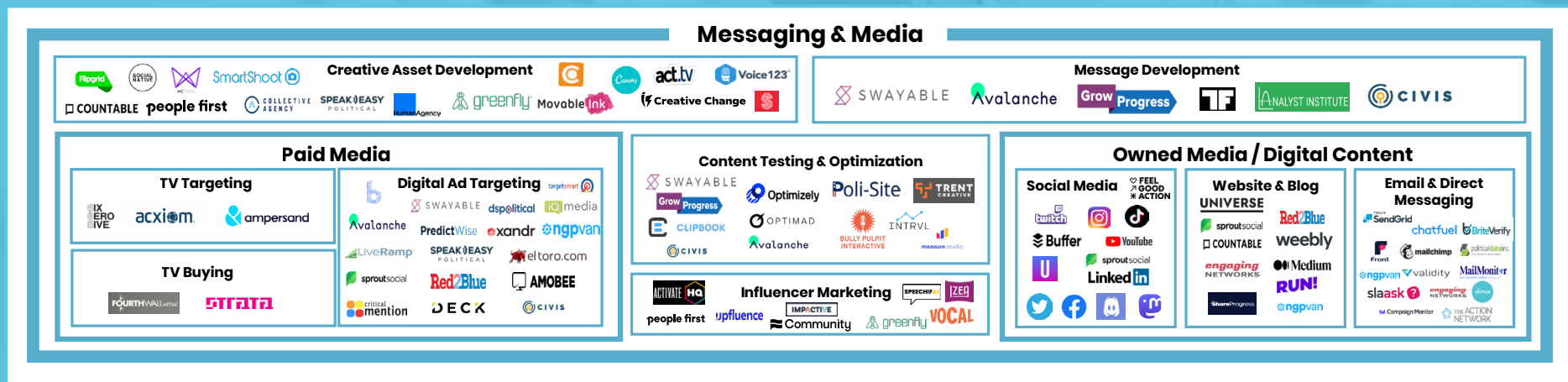


# Political Technology Industry Landscape, 2022



**Note:** Our annual landscape map is a collective, co-created documentation of this evolving space. Please [use this form](#) to contribute updates and suggestions. Thank you!

# Media & Messaging



## NOTABLE TRANSACTIONS AND ENTRANTS



INTRVL, a media optimization and audience research company, launches to help campaigns produce more effective, cost-efficient ad buys.



SpeechifyAI, an AI-powered social media engagement tool, launches to help organizations ramp up their organic social sharing efforts.



Unified, a social media network for organizers and activists, launches to provide a centralized platform for political organizing.



Wayside Press launches Political Arena – the first comprehensive video game universe set in U.S. politics.

## EMERGING TRENDS

### Campaigns flock to streaming services as more begin to accept political ads

Ad spending on streaming services increased 15x in 2022, due to popular platforms' internal policy changes and a growing realization amongst practitioners that connected TV allows for improved micro-targeting and reach, specifically with younger demographics. Hulu, Paramount+, and Peacock have

all made the decision to allow political ads, while Netflix and Disney+ have yet to take the leap.

It seems like practitioners got the memo – as we approached election day, the price of streaming ads spiked as campaigns competed to spend their war chests within an auction-based pricing system. Campaigns are accustomed to spending large

majorities of their budgets on TV ads, however TV ad placement (including streaming) skyrocketed this cycle, reaching nearly \$3 billion.

### Increased adoption, enhanced strategies for youth engagement through influencer marketing

Formal influencer programs received significant attention and investment in 2022 as Democrats leveraged new messengers to activate younger audiences. Influencer marketing was widespread – from the Biden White House, to the DNC, the DCCC, candidate campaigns, and advocacy organizations – and consisted of both paid and volunteer engagements.

NextGen America and Community Change Action together reached 13 million people on TikTok and Instagram in the final two months of midterm campaigns, and Social Currant worked with almost 300 creators to produce over 500 pieces of content. The DNC built a hub leveraging content distribution platform Greenfly to equip influencers with official talking points and messaging, generating over 83 million impressions between February-August alone.

Vocal Media, a company that connects campaigns with influencers, ran campaigns on creator-driven social media platforms, focusing on Instagram and TikTok. They secured 22 million engagements and 113 million views on election-related Vocal creator content last year. Vocal founder Malia Fisher estimates \$10 million was spent on electoral influencer marketing this cycle and projects up to \$50 million will be spent in '24 races within the \$16.4 billion overall influencer marketing industry. Vocal



From left, TikTok influencers Christian Maldonado, Tega Orhorhoro, and Ryze Hendricks. Compiled by Insider, courtesy of Social Currant



remains bullish on the long term prominence of influencers for electoral outreach, as currently 40% of Gen Z voters use TikTok and Instagram as search engines over Google. With high turnout rates among young people ages 18-29, the influencer campaigns of 2022 represent a model for youth mobilization in 2024.

### Newer social platforms gain traction with candidates and voters alike

Quickly rising in the ranks as two of Gen Z's preferred social media platforms, politicians have attempted to meet young voters where they are... on TikTok and BeReal.

While TikTok – Americans' go-to short-form video hub – has come to represent a significant source of news consumption for Americans under 30 (26%), its efficacy for turning young scrollers into Democratic voters remains to be seen. With 83 million monthly active users in the U.S., advocates say that political content on TikTok's platform can help increase engagement and bolster educational efforts. John Fetterman, Val Demings, Raphael Warnock, and Josh Shapiro, among many others, gave it a whirl this cycle.

BeReal experienced a surge in popularity with young Americans in 2022, reaching 53 million installs. Users post two pictures (front and back of their camera) at a random time throughout the day and share them on a social feed. President Biden and Jon Tester tweeted screenshots of their BeReal to engage younger voters (Biden used the platform to encourage vaccines while Tester showed off his tractor).

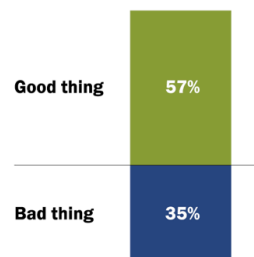
### Facebook remains a default platform for digital political advertising, but campaigns are hungry for more effective alternatives

For digital political advertisers, Facebook remains the default platform, largely due to limited options and reluctance to promote paid political content on the part of other notable platforms. TikTok, Twitter, and Twitch do not allow political ads, YouTube imposes strict limits on targeting, and Snapchat and Reddit have always been a lesser focus for advertisers. Despite its prominence as the digital political advertising platform, ad agency executives

and digital strategists reveal that Facebook today offers just a fraction of its previous return due to its stagnant user base, increasingly shrinking quantity of young users, and policy changes around targeting and transparency requirements. For example, Meta removed advertisers' ability to target based on political keywords such as “minimum wage” or “fossil fuels.” At the same time, digital consumption remains high, with the share of time on digital vs. traditional media continuing to increase. As such, campaigns are eager to reach voters on the digital channels where they continue to spend their time.

### Most say that social media has been good for democracy but has had important negative and positive effects on politics and society

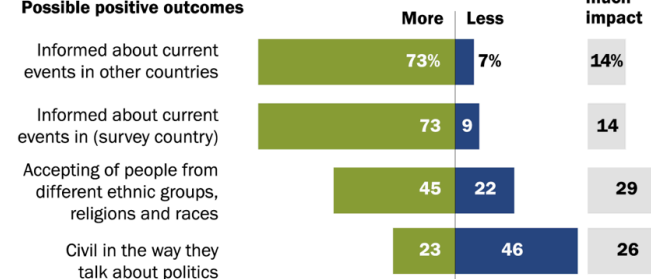
% who say social media has been more of a \_\_\_ for democracy in their country



19-COUNTRY MEDIAN

% who say access to the internet and social media has made people ...

#### Possible positive outcomes



#### Possible negative outcomes



Note: Percentages are 19-country medians except for the question about political civility, which is an 18-country median and excludes Japan due to a translation error. Those who did not answer not shown.

Source: Spring 2022 Global Attitudes Survey. Q28 & Q31a-f.

"Social Media Seen as Mostly Good for Democracy Across Many Nations, But U.S. is a Major Outlier"

PEW RESEARCH CENTER

Pew Research Center: 2022 Global Attitudes Survey. Q28 & Q31a-f. "Social Media Seen as Mostly Good for Democracy Across Many Nations, but U.S. is a Major Outlier."

### Conservatives, disaffected by leadership of and perceived censorship on traditional social platforms, buy and build their own

Former President Donald Trump, Elon Musk, and Kanye (“Ye”) West all either bought or built their own social media platforms over the course of the past 18 months. A decade’s worth of ever-increasing polarization, platform-level censorship and account suspension policies, and heightened anti-establishment perspectives on the right have led many MAGA-aligned Americans to ditch Twitter in favor of new, conservative-friendly digital venues. Musk bought Twitter, Trump founded [Truth Social](#), and Ye bought [Parler](#); all have made moves to loosen regulations over speech. What will this mean for America’s information ecosystem moving forward?

Only time will tell, but if Democrats and Republicans become so polarized that they can’t even converse on the same platform, it’s hard to see how we – as a nation – can manage to operate under the same set of facts.

Beyond conservative platforms, efforts to develop and scale Twitter replacements were sparked by the conservative Musk takeover, with [Mastodon](#) gaining the most popularity thus far. With only [1.4 million active users](#), it’s too early to tell if the platform will achieve critical mass as a robust social network or hold at its niche user base. The newest attempt at a social network for progressive civic engagement is Texas-based [Unified](#), which is doubling down on close activist leadership for engagement long term.

### Americans remain concerned about social media’s political impact

Social media is recognized as an [effective tool for accomplishing political goals](#) and for its value in helping to inform, raise awareness, and empower users. However, in comparison to other countries, Americans are more likely to say that social media has had a negative impact on democracy. A poll of 19 advanced economies revealed that the United States is an outlier across a number of measures, with larger shares of Americans seeing social media as divisive. [64% of U.S. adults](#) say social media has been a bad thing for democracy, [79% say that social media has made people more divided](#) on their political opinions, and [69% say it has made people less civil](#) in the way they discuss politics.

## AREAS OF NEED, OPPORTUNITY, AND INNOVATION

### Filling the inevitable TikTok void

TikTok’s national security implications have become the elephant in the room. In December, [FBI Director Wray noted](#) that the platform – owned and operated by the Chinese conglomerate [ByteDance](#) – permits the Chinese government to control its recommendation algorithm and manipulate content. To make matters more complicated, Wray also warned that China could theoretically collect data on TikTok users. With the FBI, DoJ, FCC, and Congress actively looking into TikTok and evaluating potential action, it’s not impossible to imagine a world in which the platform gets banned within the United States’ borders. If that happens, Americans will be left with a significant short-form video content void. There is also an increasing likelihood that ByteDance is forced to sell TikTok in the face of calls

to do so by President Biden and Congress. Despite the hypotheticals here, Musk’s Twitter takeover has demonstrated the dangers of over-reliance on social media platforms. Content creators should look to cross-post on Instagram Reels and other relevant channels to prepare for a potential shake-up of the landscape and cultivate their followings elsewhere.

### Combating fraudulent election claims on social media

In the summer of 2022, the [Washington Post reported](#) that two years after the 2020 Election, social media platforms were still bombarded with false claims about the validity of the results. According to research obtained by the Post, more than 1/8th of the posts on Twitter and about 1/12th of the posts on Facebook pages about elections in the US

reference fraud. After years of lamenting increased misinformation on social platforms, and some policy and functionality changes within them to address it, what more can platforms, regulators, legislators, and concerned citizens do to restore information integrity across our news pipelines? This remains an open question, and one that is critical in our collective pursuit to uphold the core tenets of our democracy.

### Meeting ballooning content demands with in-house content creation

In 2022, meeting high demand for digital content required unprecedented investment in staff and tools, according to DNC Chief Mobilization Officer [Patrick Stevenson](#). Pressure on campaigns to publish and distribute media in-house in order to reach voters online turned [politicians into content creators](#),

striving for authenticity over polish. With ever-shifting voter media tastes and policies around social media platforms, campaigns increasingly looked to Gen Z-aged staffers to manage accounts, create short-form content, and convey candidate messages formerly presented through formal ads.

### Using micro-influencers for hyperlocal communication

Political campaigns deployed micro-influencers to communicate their message in battleground states throughout the 2022 cycle. While TikTok bans political ads, employing social media micro-influencers (~20,000 - 100,000 followers) in battleground states has allowed campaigns to circumvent these rules and target voters when done correctly. Partnering with micro-influencers allows campaigns to directly communicate with desired demographics and target their messages to highly-specific audiences.

As an example, American Bridge 21st Century (AB21) expanded their influencer program to key races in Arizona, Georgia, Nevada, and Pennsylvania to target female voters. As part of that overall strategy, they also invested six figures in Kansans for Constitutional Freedom, a bipartisan pro-reproductive rights group that utilized influencers as part of their successful campaign to reject the 2022 Kansas abortion referendum, the Value Them Both Amendment.

As major players across our space continue to adopt and refine influencer marketing programs, they should consider the most optimal ways in which they can do so locally in order to improve their ability to tailor and target messages.

### Changing messaging operations with AI tools, ChatGPT

AI tools will likely become more widely adopted by political consultants and content creators in 2024. With new software available to generate text in response to prompts, such as OpenAI's ChatGPT, some are already testing how the tools might accelerate content creation for campaigns, including drafting press releases, fundraising emails, and social media posts. Thus far, practitioners have found both opportunities for efficiency and limitations in terms of output quality.

### Greater efficiency in ad spend

In response to the sharp increase in ad buys this cycle, with further growth expected in 2024, we expect demand to rise for media and messaging testing and analytics tools. Campaigns and organizations realized the benefit of these tools, including Swayable, INTRVL, Avalanche, Grow Progress, and Change Research to improve efficient ad spend and maximize every dollar spent.

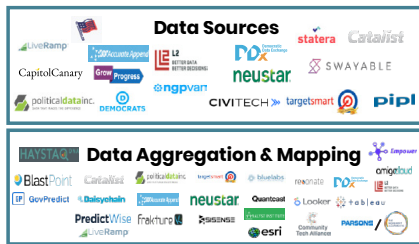


@FatGirlFlow. Instagram. Image courtesy of American Bridge.



# Data Analytics & Modeling

## Data Analytics & Modeling



## NOTABLE TRANSACTIONS AND ENTRANTS



**AdvantageAI**, a digital co-op by MissionWired that helps identify mission-aligned donors with machine learning algorithms, launches.



**Daisychain**, a user-friendly API interface, launches a Zapier-like offering to help administrators build data pipelines between Mobilize, ActBlue, and others.



**OpenField** powered by TargetSmart, a co-branded CRM partnership between the two companies, will enable OpenField users to power their instances with TargetSmart data.



**Deck**, a widely-used analytics dashboard for down-ballot campaign managers, changes ownership while serving as an increasingly key part of campaign infrastructure.

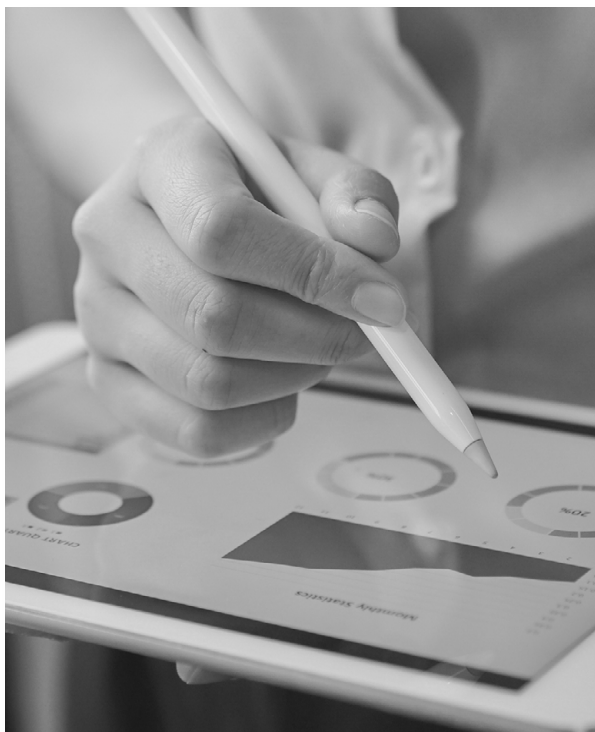


**Community Tech Alliance** launches with a mission of making world-class data infrastructure and tooling available, affordable, and easy-to-use for the progressive space.

## EMERGING TRENDS

### New voter data information leads to enhanced canvassing efforts

The DNC scaled a number of major data operations enhancements this cycle, including broad adoption of the Phoenix digital warehouse of volunteer and voter file data. Users reported positive improvements in searchability, efficient integrations opening up engineering staff capacity, and improved frequency of data refreshes. The DNC also unveiled the [Geographic Address Dataset](#) in the lead-up to the election, a constantly evolving directory of 260 million physical addresses in the U.S. The party accomplished this by pulling voter information from a myriad of sources, such as the Postal Service and



third-party, private entities across the industry. As a result of the DNC's creation of the Geographic Address Dataset, millions of physical addresses were added to its voter database. "This work has given the party a 10% increase in canvassable voters on tribal lands and an increase in canvassable voters in rural America."

### Deck outperforms polling in mitigating anti-Democratic bias in forecasts

Deck's analytics platform uses a wide collection of data inputs to model potential outcomes in races up and down the ballot. The models ingest precinct-level historical turnout data, media coverage, campaign finance data, and candidate issue data from partners like BallotReady and VoteSmart to create forecasts of election results that evolve as the race continues forward. Deck's 2022 forecasts also underestimated Democratic vote share, but by a [significantly lower margin of error](#) than traditional polls. The average error in Deck forecasts was 2.49pp, underpredicting Dem vote share by 0.94pp. Meanwhile, polls had a median absolute error of 3.6pp, underpredicting Dem vote share by 3pp.

### AI technology produces prediction models that help campaigns identify small-dollar donors

In previous cycles, campaigns used AI tools to improve voter outreach strategy and enhance message testing. Recently, they've started to use the technology to identify people who might be inclined to donate. Consultants have embraced this application and hope it will give Democrats an edge in acquiring small-dollar donors.

[Sterling Data Company](#) employs a no-code machine learning product, [Akkio.io](#), to assist in the creation of relevant predictive models. [MissionWired](#), a full-service agency founded by veteran Democratic operative Anne Lewis, unveiled AdvantageAI under its parent company, [The Digital Co-Op](#), a lead generation tool that analyzes billions of data points to generate predictions on where to find donors and how to best communicate with them.

As use cases for AI expand across the political space, questions remain surrounding privacy protection, data ownership, and opt-in/opt-out provisions. The Biden Administration released the ["Blueprint for an AI Bill of Rights"](#) that outlined a framework for the government and private sector. But architects of AI policy and political practitioners must prioritize upholding fundamental American rights as they consider new applications of this technology.

### Major firms partner to share phone data for voter outreach

Building off their data collection and sharing efforts during the heat of the pandemic to help campaigns pivot to full-scale digital organizing, [Catalist](#) and [TargetSmart](#) ramped up their partnership to share a historic amount of cell phone data this cycle. Their collective trove of valuable voter contact data included more than 85 million new or updated phone numbers, 24 million of which are associated with communities of color. In collaboration with [America Votes](#), [The Movement Cooperative](#), and others, this initiative helped ensure that advocacy organizations around the country were well-positioned to conduct extensive GOTV efforts ahead of the election. This

type of collaboration in the data-sharing space is critical for sustaining the movement and ensuring that advocates on the ground have access to the most up-to-date information possible.

#### **Democratic Data Exchange scales to process 1 billion records**

The Democratic Data Exchange (DDx), founded in April 2019, expands access to data within the Democratic and progressive ecosystem by facilitating a real time, blind exchange of program data from more than 500 organizations across the left. DDx processed more than 1 billion data

records throughout the 2022 cycle, including calls, texts, walks, support IDs, race and ethnicity IDs, polling, and more. This allowed for more efficient resource allocation, refined universes, and a better understanding of voter behavior. This cycle, DDx found that of the almost 10 million calls and texts that resulted in identifying a wrong number, 3 million were already identified by other organizations as a wrong number. Moving forward, the expansion of anonymized data sharing is poised to represent one of the most significant enhancements for resource allocation and the volunteer experience.

*“DDx data allowed the Arizona team to cure nearly 3,500 ballots statewide without hurting down ballot races – this was 12.5 times the win margin of the Attorney General’s race in AZ who won by just 250 votes.”*

**EMILY NORMAN, CEO,  
DEMOCRATIC DATA EXCHANGE**

## **AREAS OF NEED, OPPORTUNITY, AND INNOVATION**

#### **2022 HGL Buyers’ Survey shows a deep need for better analytics tools**

38.6% of respondents to [HGL’s 2022 Buyers Survey](#) pointed to analytics tools as an area in need of improvement. Some recommendations – such as finding ways to better integrate data across tools – have become common refrains cycle-over-cycle. Others, such as innovating on ways to capture unique data (relational touches, online engagement) that don’t fit into traditional contact models, are novel and worth exploring further in the off-cycle year.

Further, 41.6% of survey respondents noted that a complex integration was among the reasons that led them to saying “no” to purchasing a tool. Survey comments indicate that developing more

comprehensive suites of reports for campaigns across verticals (field, digital, fundraising) would be immensely helpful for their work – demonstrating a need across the space to understand end-to-end trends without having to hire a data engineer or analyst. Without better analytics tools, seamless integration, and more regimented processes, practitioners’ ability to fulfill their duties across a variety of functions will continue to be hindered.

#### **Ongoing data integration needs throughout the tech ecosystem**

As our volunteer recruitment and voter contact tool options expand and diversify in step with social media and digital ecosystems as a whole,

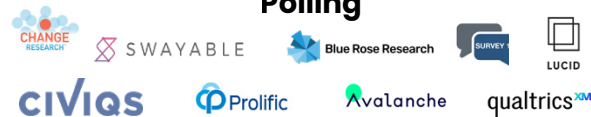
the need for ease of integration and API-supported data pathways that enable organizers to quickly and easily update, export, track, and report data in real time across their tech stacks is ever increasing. Tech vendors and groups, including Daisychain, Community Tech Alliance, and The Movement Cooperative’s Parsons team, are working to simplify data portability and management in order to support organizers’ need to focus on their programs instead of downloading and uploading spreadsheets. While much progress has been made on this issue in recent years, there is still a great need for robust data integration solutions.



# Research

## Research

### Polling



### Social Listening & Sentiment Research



### Opposition Research & Media Monitoring



### Policy Research & Legislative Tracking



## NOTABLE TRANSACTIONS AND ENTRANTS



**FiscalNote**, an AI-driven enterprise SaaS company that focuses on legal and regulatory data, goes public in August 2022. FiscalNote acquired HGL portfolio company FactSquared in 2021.



**Clipbook**, a media monitoring startup, launches to serve political organizations that traditional press clips providers often overlook.



**Avalanche Insights** expands to offer consulting services on top of their SaaS-based messaging and sentiment research platform.

## EMERGING TRENDS

### Advancements in message testing

Democrats' ability to message test got a serious upgrade over the last cycle. [Grow Progress](#) and [Blue Rose Research](#) both made advancements in this field with respect to cost and speed. Through piloting novel methods for sourcing survey participants and analyzing results, these organizations were able to test statements and associated policies for less than \$400 and turn around results in a matter of days.

However, some practitioners across the political tech ecosystem still worry about the accuracy of message testing, with concerns ranging from the makeup of reduced cost web panels (strong partisans, outlier participants) and consistency of effect sizes across trials and firms. While there is more work to be done on that front, cheaper and more effective testing will aid Democrats up-and-down the ballot as they look for a brand and message upgrade ahead of 2024.

### Swayable and Way to Win partner on RCT metastudy

Last cycle, Swayable's pre-testing platform anchored efficient spend for a large selection of Senate and gubernatorial campaigns. In conjunction with Way to Win and dozens of partner organizations, they released a powerful metastudy that included 255 independent RCT survey experiments on over 1,000 ads. The results upended many common assumptions about effective messaging strategies from 2020. Ads targeting the political center or particular demographic groups performed no better than average (even among the target groups),

while narratives with sharp critiques of the right outperformed across demographics. An independent analysis by academics from MIT, Berkeley, and Yale found that patterns in message outperformance are cycle-specific, underlining the ongoing need for creative pre-testing.

### Catalist, Strategic Victory Fund partner to extend the value of polling

To offer an alternative to the time-bound nature of single number polling results that cannot capture changes during a dynamic campaign timeline, Catalist and Strategic Victory Fund partnered to roll out a new 'scenario-based' polling analytics model. This model leverages a large voter file based sample that can be used early and often to better understand and integrate ground-up feedback during the campaign cycle.

### Catalist launches DEIA data initiative

Janay Cody, Senior Advisor for Data Equity at Catalist, has led a notable new initiative to create resources for organizations relying on vote propensity scores, with a focus on how different demographic groups have different score ranges. Such scores are intended to support efficiency in campaigning, but they reflect historical voting patterns and are generally lower for groups that face barriers to voting, including younger voters and voters of color. By using different cutoff points for different demographics groups, organizations can ensure their programming reaches representative universes.

## AREAS OF NEED, OPPORTUNITY, AND INNOVATION

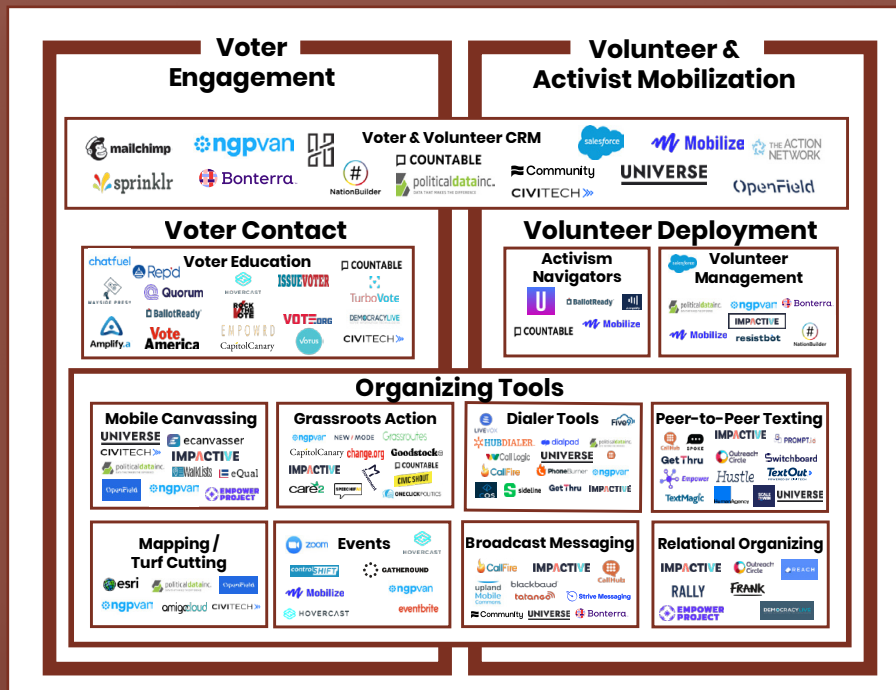
### Polling errors continue, leaving room for improvement in 2024

Polls certainly performed better in 2022 than in 2020, but accuracy issues remain salient ([See Data for Progress' 2022 Polling Accuracy Report](#)). Throughout much of the last cycle, traditional [polls](#) seemed to suggest a rather formidable red wave. As we know, that never materialized, with Democrats maintaining control of the Senate and narrowly losing the House.

Skewed polling results hurt more than just public perception; they hurt practitioners' ability to run successful, holistic programs. According to a [New York Times report](#) that claims inaccurate polls "fed a false election narrative," these results – considered some of the highest of quality research – encouraged some candidates to spend more money than necessary and diverted resources away from others who might have otherwise had a chance to win.

Of course, not all pollsters drew the same conclusions this cycle. Change Research's work with the House Majority Project, for example, showed promising early signs refuting 'Red Wave' worries, as noted in their [2022 Change Research Accuracy Report](#). As polling continues to significantly impact public perception and campaign investments, the question remains — how can pollsters moving forward improve their sampling, contact methods, and weighting processes? This central question must be addressed ahead of the critical 2024 Presidential.

# Volunteer & Activist Mobilization and Voter Engagement



## NOTABLE TRANSACTIONS AND ENTRANTS

- ✓ Rally, a relational organizing platform and network, launches to help scale paid and unpaid relational efforts.
- ✓ eQual launches to help ballot initiative campaigns improve their signature gathering operations.
- ✓ Movement and Frank launched organizing platforms designed specifically for labor unions and union member engagement.



## EMERGING TRENDS

### Persuasion programming continues to be a powerful strategy

New research from Galvanize Action and Grow Progress demonstrated just how powerful persuasion programming can be. In a study of white women across PA, WI, and OH, sustained programming over six months with ads tailored to core values and hopeful, solutions-based narratives resulted in an 8.33pp increase in vote choice for the Democratic Senate candidates. The persuasion programming also “decreased the percentage of white women who blamed the Biden Administration or Democrats for inflation by 8.6pp, and increased the percentage who blamed corporations, greed, and the wealthy by 4.7pp.” These findings signal an opportunity for future campaign messaging and positioning strategies, and the extent to which persuasion programming represents a worthwhile investment.

### The promise of deep canvassing

Data-driven field operations have dominated progressive campaign strategies over the past several cycles. In the leadup to the 2022 midterms, however, the effectiveness of Democrats’ approach to canvassing was increasingly called into question. Specifically, concerns were raised around field programs taking time- and cost-ineffective approaches to data collection and losing the deep listening and human connection that makes door-to-door canvassing so powerful. Moreover, many campaigns fundamentally lack the volume of volunteers required to effectively conduct broad-based field programs, begin canvassing efforts too late in the cycle (after Labor Day), and fail to adopt

truly sophisticated targeting in their field work. There is an opportunity and call to better focus, improve, and prioritize field efforts around “deep canvassing.” Deep canvassing offers a person-centered approach to engagement with voters on complex issues and is focused on building emotional connections and resolving cognitive dissonance. For campaigns large and small, deep canvassing is being discussed as the key to unlocking more effective field programs.

### Young voters continue to up their engagement

The Harvard Institute of Politics’ national youth poll, released in April 2022, indicated that 18-29 year olds were on pace to match their record-breaking turnout numbers from 2018. Post-election, we learned that this increasingly relevant and engaged voting bloc voted in droves, with about 27% of youth voters between the ages of 18-29 casting a ballot — the second-highest youth voter turnout in almost three decades. Notably, Harvard’s poll found that 55% of respondents lean-Democratic.

HeadCount, a nonprofit organization that registers voters at concerts and other in-person events, registered almost 200,000 new voters in 2022 by teaming up with Harry Styles, Ariana Grande, Megan Thee Stallion, Beyoncé, Billie Eilish, Lizzo, Panic! At The Disco, Paramore, and many more. Through a registration-to-relation product experience built on Impactive, HeadCount linked a relational element to the flow to new registrants to triple their reach. The strategy was successful in 2022, with another high turnout ratio expected similar to the 78% turnout rate for HeadCount-registered voters in 2020.

*“In 2022, HeadCount moved its digital and field voter engagement efforts to Impactive – the tool enabled us to sync our in-person, text, social media campaigns together, which vastly improved our data flow, efficiency and affinity-based Get Out the Vote program. More importantly, the relational outreach built into the platform organically grew our reach into young fan communities across the country in real time.”*

**TAPPAN VICKERY, SENIOR DIRECTOR OF PROGRAMMING & STRATEGY AT HEADCOUNT**

Teen Vogue and Change Research’s Midterm Vibe Check provided insights around younger voters who approve of liberal policies but do not credit the Democratic Party. A holistic voter experience bridging the election of Democratic representatives with follow through to positive results in Washington is needed.

As changing demographics and redistricting continue to disrupt the political landscape, Democratic campaigns should look to young voters as a group increasingly receptive to issue-based messaging and mobilization tactics.

### **Paid relational organizing shines through in Pennsylvania, Georgia**

Relentless – and its new app, Rally – stepped up this cycle to scale its relational organizing programming, which includes recruiting low-propensity voters in harder-to-reach neighborhoods and empowering them (via training and financial compensation) to canvass their friends. Their Georgia runoff program hired 1,300 people to mobilize 70,000 of their friends and family within 15 days. Of the voters in this network, 23% had not voted in the 2020 election.

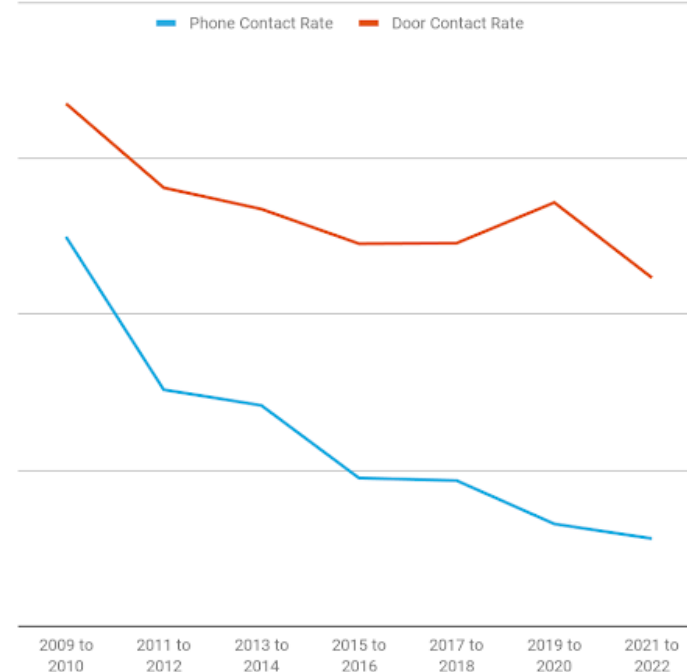
Speaking of facilitating relational conversations at scale – Impactive continued to deploy its proven relational tool to congressional and senate races across the country, while the Progressive Turnout Project spent over \$2 million to support relational organizers in a variety of critical swing states.

### **Political text messages reach a tipping point?**

Throughout the final stretch of the 2022 cycle, Americans were bombarded with a record number of political text messages. While this trend has been accelerating (in terms of both quantity and intensity) since 2016 when Hustle et al. empowered campaigns to text voters at scale, it appears that the situation reached a tipping point. According to the New York Times, over the last year, Americans filed 9,477 fraud reports and submitted 2,000+ complaints related to political text messaging. Americans received 1.29 billion texts in October 2022 alone (according to estimates from RoboKiller).

Campaigns have every right to reach voters in the manners they choose, so long as they are within the bounds of the law. Political text messaging is a largely unregulated field. While social media

Democratic campaigns used a combination of innovative and traditional outreach methods powered by technology to complete more voter contact attempts this cycle than in any past midterm. Simultaneously, overall contact rates are declining.



Democratic National Committee, 2022

platforms and TV advertisers impose strict rules on content, text messages are subject to carrier-imposed registration and conduct requirements, known as 10DLC, which attempt to limit some spamming behavior. Unfortunately, 10DLC complexities and lack of consistent enforcement amongst carriers has also had the result of disenfranchising good actors attempting to use SMS for ethical outreach.

Meanwhile, campaigns, PACs, IEs and other groups, particularly on the right, have utilized texts to spread messages containing misinformation and harsh smears that might not make the cut for publication on Facebook. Federally, auto-dialers are regulated by the FCC (under the Telephone Consumer Protection

of 1991), but no similar set of standards or consumer rights apply to texts.

While it's unrealistic and unwise to call for an end to political text messages, practitioners and regulators should engage with increasing popular sentiment around saturation and efficacy of spam-like messaging on long-term voter enthusiasm. Further, they should take steps to prevent the spread of misinformation and promote maximally accessible opt-out options for the overwhelmed. They should take steps to prevent the spread of misinformation and promote maximally accessible opt-out options for the overwhelmed.

## AREAS OF NEED, OPPORTUNITY, AND INNOVATION

### Scaling relational organizing and defining success metrics

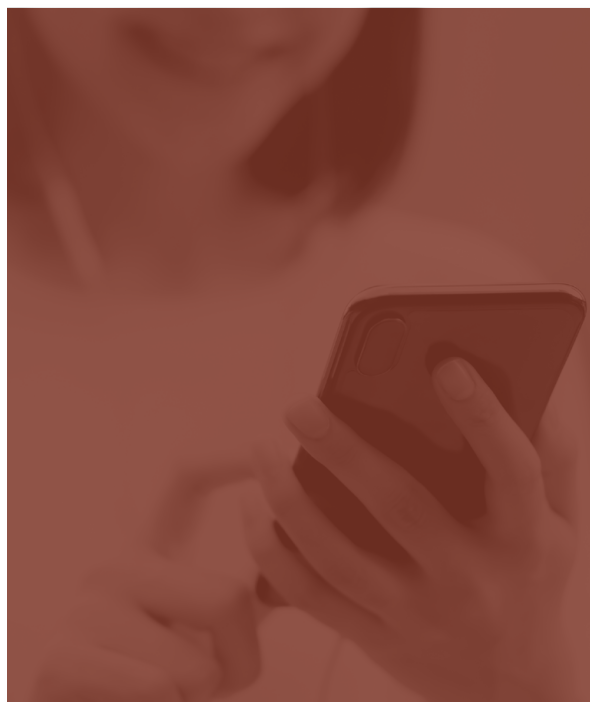
Higher Ground Labs has been writing about and investing in relational organizing since the lead-up to the 2018 cycle; the collective of immensely talented organizers and companies working on this has outperformed all expectations. As relational evolves from a “shiny new tactic” to a central piece of the majority of organizing operations, our space needs to determine how to best scale these programs for consistent statewide and nationwide efforts, in addition to identifying clear metrics that define success. How do we ensure accountability and improve reporting? How do we ensure that relational serves as an apt complement to traditional cold outreach tactics? How can paid and unpaid relational efforts best coexist across the same entity? While some of these questions might be solved by technology, the vast majority of them will require enhanced coordination amongst practitioners.

### Reinvigorating the Democratic volunteer base and managing a hybrid organizing model

This cycle, many practitioners lamented a shortage of volunteers out in the field - a significant problem that has been overlooked in many postmortem analyses. What explains the shortage? A combination of lingering effects of the pandemic, a regionally-segmented enthusiasm gap, and the proliferation of digital advocacy tools that allow people to contribute to political efforts from their couches. But so long as Democrats continue to prioritize door-to-door

canvassing and other forms of in-person outreach, this shortage will plague operations across the board. Moreover, campaigns are facing a management challenge – organizers are now tasked with running hybrid programs and coordinating activities for volunteers at the field office and over Zoom.

To address these challenges, campaigns and organizations must prioritize providing ample, high-quality training opportunities to ensure volunteers are best-positioned to succeed and less likely to burn out. They also need to rethink engagement incentives– to give volunteers more and more



reasons to come back for an additional shift or bring a friend along. Campaigns must optimize their recruitment and management practices, creating more cohesive units of volunteers that are ready and eager to support the mission. And field staffers should take lessons from the private sector about the best ways to simultaneously engage affiliates and supporters in-person and virtually.

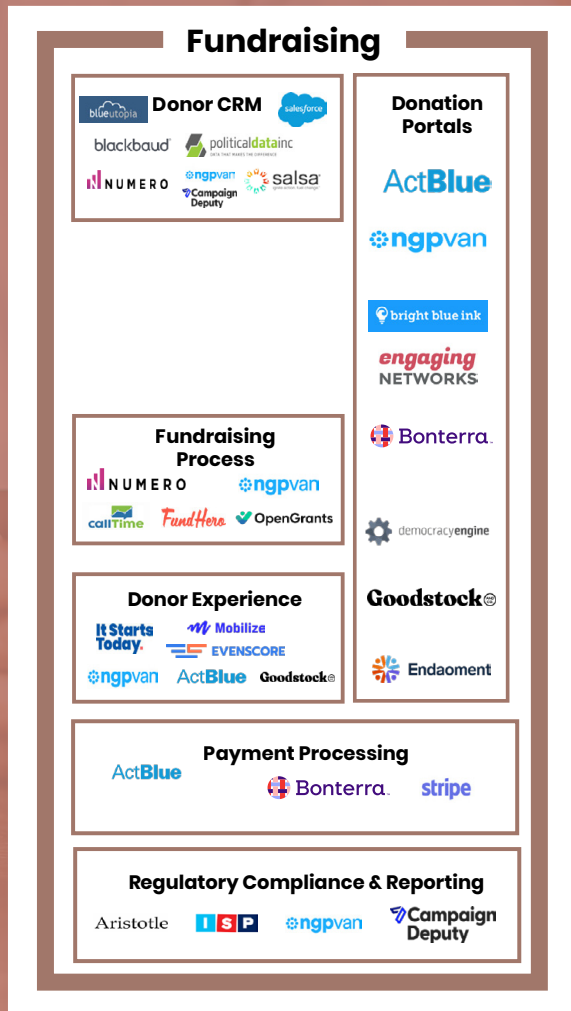
### Identify new approaches to improve contact rates

Democratic campaigns made more voter contact attempts this cycle than in any past midterm. In fact, outreach has tripled since 2014, the last midterm with a sitting Democratic President. This trend is supported by new technology such as texting and scaled use of dialers and canvassing apps. Despite this increase in contact attempts, contact rates across traditional outreach channels have been declining for multiple cycles; this trend was particularly salient in 2022.

Ahead of the 2024 cycle, campaigns ought to consider ways in which they can improve their outreach efforts, in terms of both mechanisms and messengers. How might campaigns be incentivized to prioritize long-term organizing and relationship building over burning out voters, volunteers, and donors in pursuit of hitting shorter-term fundraising goals? How do we make higher quality contacts so people engage rather than tune out politics?



# Fundraising



## NOTABLE TRANSACTIONS AND ENTRANTS

- ✓ EvenScore launches to help donors maximize the impact of their campaign and cause contributions.
- ✓ OpenGrants, a search engine and marketplace for grant seekers and grant writers, launches to make the grant funding process more efficient and transparent.
- ✓ Numero launches a separate product – Electables – to help campaigns orchestrate grassroots fundraising campaigns via NFTs.
- ✓ Engage Raise launches to help make candidate crypto donations easier for all parties involved.

## EMERGING TRENDS

### ActBlue sees record midterms donations, announces new CEO

Once again, ActBlue helped funnel billions of dollars to Democratic campaigns and causes throughout the 2022 cycle. The platform processed \$3.5 billion to 27,305 campaigns and organizations. These contributions came from 7.4 million unique donors who, in tandem, made 86 million individual contributions; their average donation size was \$40.05. In comparison to the 2018 midterm cycle, the total number of contributions and dollars raised doubled, reflecting both the growth of the Party's small dollar donor base and the sense of urgency felt across this cycle to take action in response to unprecedented challenges to our long-held freedoms.

As the new year kicked off, ActBlue also named a new CEO, Regina Wallace-Jones, who is the first Black woman to hold the role.

### Web3 toe-dips in political fundraising, candidates and platforms face structural and societal headwinds

As we wrote about in our Web3 x Politics Report, Web3 technologies (crypto donations and campaign NFTs) made their foray into the political space, thanks to the innovative experiments run by candidates like Shrina Kurani and new startups like Electables.

Many campaigns on both sides of the aisle accepted crypto donations (via BitPay) for the first time despite the lack of regulatory clarity from the FEC. While only a sliver of total dollars raised were contributed via cryptocurrencies, technologists and finance directors were able to develop and utilize compliance-focused infrastructure to accept and process these new kinds of assets. Further, a handful of House, Senate, and gubernatorial candidates developed and launched campaign NFTs. While they all experienced varying

degrees of success in terms of fundraising, they charted the path for how candidates can utilize unique digital collectibles to enhance their brand and engage donors and volunteers.

Despite the significant market shift in cryptocurrencies (as brought on by the collapse of Terra, rising inflation, the fall of FTX

and its infamous CEO Sam Bankman-Fried, and other unfortunate circumstances), innovation in the Web3 space has kept a remarkable pace. Will these technologies play a role directly within political campaigns in 2024 or 2026? Time will tell.

### Innovative virtual fundraisers to drive donations

In an age where the lines between physical and virtual are increasingly blurred, campaigns are looking to innovative virtual events to reach donors. For example, The Democratic Party of Wisconsin (WisDems) and Hovercast worked together to host successful streams and virtual events, including a crossover reunion with the casts of Veep and The West Wing that raised \$700K+ from 13K grassroots donors. Cutting-edge design and execution of such virtual events is key to fundraising success, from embedded calls to action for donations and social sharing to real-time custom donor shout-out graphics to progress tracking meters and more.

### Donation optimizers

There is a growing appetite amongst small-dollar donors to ensure their donations make the highest possible impact. Contribution dashboards like EvenScore make it easier for donors to compare the value of their donations across multiple campaigns or organizations, while taking advantage of critical data from sources like Deck.

#### CYCLE-TO-CYCLE COMPARISON

	2018 Cycle	2020 Cycle	2022 Cycle
Contributions	42,101,257	133,390,772	86,471,596
Dollars Raised	\$1,662,993,162	\$5,080,054,625	\$3,463,499,800
Average Contribution Size	\$39.50	\$38.08	\$40.05
Unique Donors	4,940,261	15,050,186	7,438,750
Unique Campaigns, Committees, and Organizations	7,838	10,954	14,352

## AREAS OF NEED, OPPORTUNITY, AND INNOVATION

### Protecting seniors from unsavory and unethical solicitation tactics

Older Americans are some of the most active political donors. But rather than respectfully courting them, according to a [New York Times report](#), digital and finance staffers in both parties are utilizing deceptive tactics and manipulative, age-targeted messaging to secure contributions. [Everything from](#) insincere offers to match donations, to subject lines reading “Social Security,” to pre-checked boxes that indicate consent to recurring donations have been employed to coerce older Americans. Though these practices

aren’t illegal, Democratic operatives have a moral imperative to build a coalition based on trust and mutual respect. Our tactics must match our values.

### Empowering volunteer fundraisers

As our space has come to realize that in many cases, a nudge from a trusted peer is a more effective persuasion and mobilization tool than a nudge from a stranger, that same logic could (and probably should) apply to fundraising. To raise money from small-dollar donors, campaigns typically rely on social media ads or cold text outreach that, as

mentioned above, often feels like spam or suffers from declining efficacy rates. In an effort to broaden their universe of total donors and avoid spamming their target audience, could campaigns empower engaged volunteers to serve as decentralized “[volunteer donor advisors](#)” or “small-scale bundlers” for their networks? [Donor Organizer Hub](#) has started hosting private trainings to support those interested in taking initiative, but there may very well be interesting ways to iterate on existing or build new technology platforms to empower this underdeveloped concept.



Could campaigns empower engaged volunteers to serve as decentralized “small-scale bundlers” for their networks?



# Movement-Wide & Organizational Infrastructure

## NOTABLE TRANSACTIONS AND ENTRANTS

- ✓ The Good Catch Bug Bounty Program leveraged political technologists and ethical hacker/researcher communities to secure key campaign tech infrastructure.
- ✓ Democratic Data Exchange expanded to provide additional derived products and offerings that enable strategic decisions and resource allocation shifts.
- ✓ stac labs piloted a new tool this cycle – Ecclesia – that helps state parties distribute the voter file to down-ballot campaigns.

## Movement-Wide

### Information Integrity



### Electoral Admin & Voter Resources



### Internal Comms & Productivity



### IT Infrastructure & Security



### Campaign Strategy & Management





## EMERGING TRENDS

### Trend toward earlier tech purchases

According to our 2022 buyers' survey, campaigns have begun engaging with tech vendors earlier in the cycle, as compared to our 2020 Election Tech Survey findings. 37% of survey respondents engaged over one year before Election Day, as compared to 29% of respondents in our 2020 survey. Moreover, just 7% of respondents said they engaged at the last minute in 2022 (1-3 months before Election Day), down from 17% in 2020. This represents a promising trend for campaigns to take full advantage of political tech's power and to limit the opportunity cost of late adoption.

### Tech adoption based on previous experience prevails, presenting challenges for emerging tools

59% of respondents to our 2022 Buyers' Survey shared that they heard about their tech tools from previous campaigns. While 56% of respondents noted that they learned about technology through research, only 22% pointed to cold outreach by vendors. Moreover, the top reasons they rejected buying a tool included that it was too expensive, required complex integration, and/or was not good enough for their needs. This indicates a challenge facing new and emerging political tech tools, as limited resources hinder campaigns' willingness or ability to experiment with new platforms.

### Data Exchange reductions of contact redundancy improve voter experience

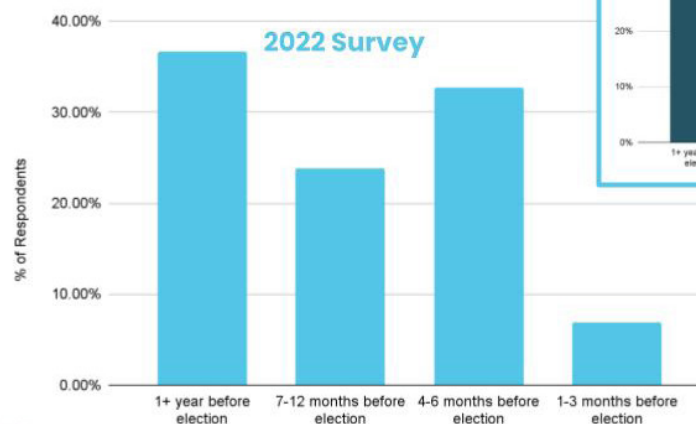
During the 2022 cycle, DDx expanded to provide additional derived products and offerings that enable clients to make broad strokes, strategic decisions

and resource allocation shifts within cycles. In 2022, a large national soft-side organization used a custom DDx derivative report to visualize saturation across the ecosystem during the last month of the election and the GA runoff. The team used this information to deprioritize geographies covered by other programs and focus on filling the gaps. Understanding of cross-ecosystem saturation led to a 50-80% reduction in redundant attempts. The DDx bolstered products that support this type of large-scale shift in prioritization in 2022, and they intend to continue doing so moving forward.

*"Democratic Data Exchange (DDx) data allowed the Arizona team to cure nearly 3,500 ballots statewide without hurting down ballot races – this was 12.5 times the win margin of the Attorney General's race in AZ who won by just 250 votes."*

**EMILY NORMAN, CEO,  
DEMOCRATIC DATA EXCHANGE**

## When Do Campaigns Engage Tech Vendors?



n=101 responses

higher ground labs 11

### Improving voter file accessibility for down-ballot candidates

Stac Labs piloted a new tool this cycle – Ecclesia – that helps state parties distribute the voter file to down-ballot campaigns. While still in its MVP stage, the tool offers a simple interface for candidates to request access, sign contracts, and make payments, while providing state party staffers with a better handle on the administrative tasks required on their end. For down-ballot candidates with small teams, simplified access and ease-of-use surrounding the most critical package of campaign information is a step in the right direction.

### Down-ballot tech improves but needs are still generally unmet

It's safe to say that Democrats overperformed down-ballot in 2022, as the Party secured significant victories across the board. Democrats secured trifectas in Michigan and Minnesota for the first time in 40 and 10 years, respectively; flipped the

State House in Pennsylvania; and made significant inroads in the Arizona State Senate. Was this due to unexpected political headwinds for conservatives, unprecedented funding and coordination, or newly accessible tech? Probably a combination of all three, and there is much more to be done.

Companies like Goodstock (merchandise designer and provider) and SpeakEasy Political (digital and mail creative development) made it easier for down-ballot campaigns to access critical and cost-effective services typically reserved for campaigns with larger budgets. Campaign Academy by Universe piloted a step-by-step guide to help down-ballot candidates prepare and take the requisite steps for establishing their campaign operation.

However, down-ballot candidates still lament the fact that they cannot find, afford, or make use of other critical services, ranging from website development to digital content management to district data and demographic analysis tools.

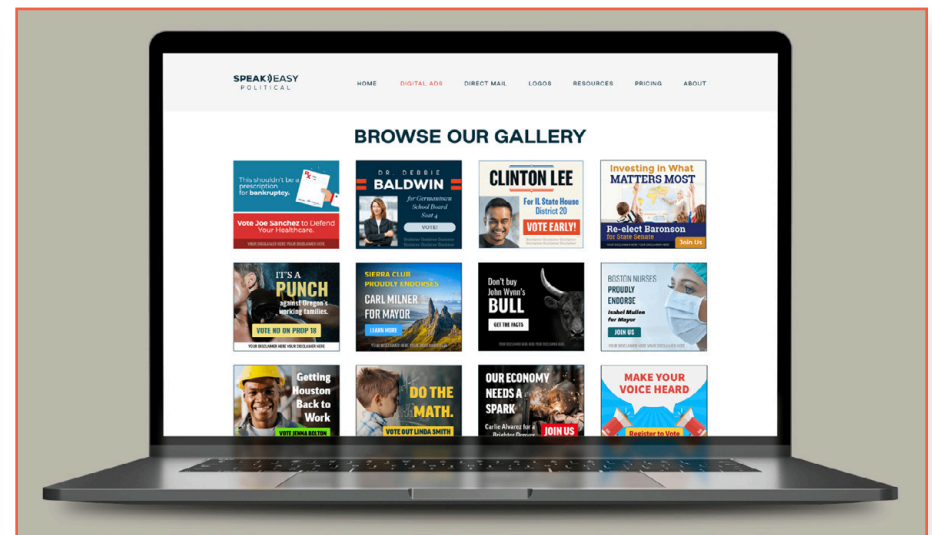
To address this, organizations like stac labs have started working with state parties to fill marketplace gaps in finding and adopting accessible tech and providing training alongside Arena, DigiDems, and others. Candidate recruitment initiatives such as Pipeline Initiative, EMILY's List, and Run for Something also play a pivotal role in both utilizing and sharing tech resources available to these powerful local campaigns.

### Second major bug bounty programs expand tech resilience

The Good Catch, a joint initiative of Trestle Collaborative, Zinc, and Higher Ground Labs, helped Democratic and progressive organizations like Impactive, Switchboard, and Empower Project become more secure by reporting a collective 118 reports, resolving 55 reports, with 77 awards totaling \$17,700. This marks the second election cycle with a progressive bug bounty program designed to secure key infrastructure.

*"Many of the 520,000 elected offices go uncontested each cycle. Technology products developed for a \$1m client are fundamentally different from what a \$1k client can manage, but providing price- & capacity-accessible tech to local campaigns and the organizations who work to support those campaigns can have profound benefits for voter experience and civic engagement."*

**AUDRA GRASSIA, PIPELINE INITIATIVE**



SpeakEasy Political

## AREAS OF NEED, OPPORTUNITY, AND INNOVATION

### A political tech marketplace

As an increasing number of useful, unique tools enter the fast-growing political tech marketplace, campaign managers and organizations need a more thorough and user-friendly resource for reviewing feature sets, understanding use cases, gauging past customer reviews, and comparing prices. Higher Ground Labs helps in this area by offering free consultations and producing comprehensive guides; stac labs plans to build on and expand Ecclesia to offer access to a slate of other tools (SMS, dialers), as well. But a new, independent solution might be needed to complement.

### The wake of NGP VAN's consolidation into Bonterra

NGP VAN was recently acquired by Apax Funds and merged with Bonterra, a larger company that focuses heavily on tools for 501c3 nonprofit organizations. Some individuals in the field have expressed concerns about the future of this fundamental progressive tech infrastructure following the acquisition, especially given the departure of key NGP VAN leaders and Bonterra's recent 10% reduction in workforce. These developments have caused uncertainty and anxiety about the overall stability of the political tech ecosystem. Others have viewed this as an opportunity for more innovation and have called for the creation of more community-owned, nonprofit infrastructure to ensure the security of critical systems. In response to this news, multiple competitors have recently launched providing the movement with more options. We anticipate seeing a surge in innovation in these areas

of the political tech ecosystem, which have remained relatively stable for over a decade.

### Local hiring practices

Campaign staff – from organizers to communications professionals – are, among other things, tasked with keeping their finger on the pulse of the electorate their candidate wishes to court, building local (district or statewide) networks, and conducting targeted outreach to communities. However, in many cases, a significant portion of campaign staff are not from nor have ever lived in the city, town, or district in which they work. They're often selected from a pool of recent college graduates from out of state. This presents challenges surrounding perceived authenticity and localized subject-matter familiarity. Campaigns benefit when they are able to hire qualified staff who will ultimately work on races in areas in which they have lived experiences. This might have to start on college campuses, but regardless, this is a problem worth consideration across our space.

### Improvements to talent recruitment and retention

We must strive to improve broadly on recruiting and training – burnout, staff shortages, and exhaustion are reported across the board in debriefs of the 2022 cycle. The pandemic, enduring toxicity of emboldened conservative extremists, and recession-triggered layoffs have challenged workers nationally. In addition, campaign workers also grapple with low compensation, long hours, unreliable professional environments, and instability of income and healthcare coverage. As a result, we lose tremendous

talent, institutional knowledge and innovation to other industries each cycle. Advocates are discussing the role of improved compensation, benefits retention, unionization, professional advancement, management skills, and career sustainability of the people who power this work. As the political technology community continues to further diversify and better match our country's electorate, expanded efforts to hire, support, and retain staff who are BIPOC, women, LGBTQIA, disabled, and/or new to the space require essential investment.

Conversations about the trials and tribulations of living our values as progressives are not new, but they are evolving. As we all strive to show up and grow in the best ways for these conversations, we would like to gratefully amplify the vision shared by Maurice Mitchell, National Director of the Working Families Party in his 2022 article, [Building Resilient Organizations](#).

*"We must learn how to synthesize lessons from the past and observations in the present. That means sitting in an awkward both/and place. We must call out fallacies that weaken us, even when it's hard and we face criticism for it. And we must meet our problems with grounded solutions that are drawn from a sober assessment of the larger time, place, and conditions we find ourselves in. None of this, of course, will be easy. In fact, much of it will cause great discomfort. However, on the other side of the uncomfortable journey is an abundant, playful, and powerful home for our freedom dreams. Will we choose it?"*

**MAURICE MITCHELL, NATIONAL DIRECTOR OF THE WORKING FAMILIES PARTY**





## CREDITS

### REPORT LEAD

Russell Mindich  
Hillary Lehr

### RESEARCH ASSISTANTS

Maya Berkman  
Eden Powell

### GRAPHIC DESIGN

[Herland Studio](#)

### CONTRIBUTORS

DAVIS MANOUSHAGIAN, STAC LABS

PAM GIDWANI, DCCC

MICHAEL FRIAS, CATALIST

EMMA FRIEND, DNC

ASHLEY ROBINSON,  
PROGRESS GEORGIA

KIERSTEN ARNONI, ACTBLUE

MEG SCHWENZFEIER, DSCC

CARLISSIA GRAHAM,  
NEW MEDIA VENTURES

JOSE NUNEZ, DNC

LOU LEVINE, NGP VAN

ARI TRUJILLO-JOHN, OPENFIELD

EMILY NORMAN, TARAH MARSHALL,  
AMY REGER, DEMOCRATIC DATA  
EXCHANGE

KATIE MILLER, KAT ATWATER,  
COMMUNITY TECH ALLIANCE

IAN BAUM, GEORGIA DEMOCRATIC  
PARTY

CRISTINA SINCLAIRE, CLARITY  
CAMPAIGNS

EMILY GITTLEMAN, UPLIFT CAMPAIGNS

ADAM KIRSCH, CHANGE RESEARCH

AUDRA GRASSIA, GOODSTOCK

DAVID SLIFKA, BLUEM VENTURES

GRETA CARNES, NORA GROSSMAN,  
DAVIS LEONARD, RALLY

TOVAH PAGLARO, AVALANCHE

MIKALA PAULA COHEN, SWAYABLE

NASEEM MAKIYA, IMPACTIVE

MAX WOOD, DECK

ABE RAKOV, ROSS MORALES  
ROCKETTO, RUN FOR SOMETHING

DAN MCSWAIN, HELM

MATT HODGES, ZINC LABS

MICHAEL BRODSKY, FORMER  
CANDIDATE FOR MICHIGAN STATE  
HOUSE DISTRICT 103

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