

Spring 2022 IU O’Neill V600 Global Capstone

Enhancing the Political Engagement of Americans Living in Germany

Clients:	Kenton Barnes	Chair – Democrats Abroad Germany
	Jonah Otto	Research & Teaching Fellow – Universität Augsburg Munich Vice Chair – Democrats Abroad Germany
	Emily Lines	Vice Chair – Democrats Abroad Germany
	Kaitlyn Kennedy	Communications Coordinator – Democrats Abroad Germany
	Teresa Ritterhoff	Get Out The Vote Coordinator – Democrats Abroad Germany
	Kaili Morris	Caucus Coordinator – Democrats Abroad Germany
Instructor:	David Audretsch	Prof. – O’Neill School of Public and Environmental Affairs Ameritech Chair of Economic Development Director – Institute for Development Strategies

Course Summary:

Democrats Abroad is the official overseas arm of the Democratic Party, USA. Democrats Abroad is the organization that represents all United States citizens residing outside the U.S. who wish to adhere to the principles, and further the aims, of the Democratic Party of the United States of America. The organization is recognized by the Democratic National Committee ("DNC") as the equivalent of a U.S. State Party, therefore holding its own state primary for presidential elections. Democrats Abroad is a fully-volunteer, non-profit association organized and operating under the Uniform Unincorporated Nonprofit Association Act of 2000, D.C. Code §§ 29-971.01, et seq.

For administrative purposes, Democrats Abroad is divided into Country Committees and Regions comprised of the members from within each such country and Region. Membership in Democrats Abroad is open to all citizens of the United States of voting age (or who will be such before the next Federal election) who have declared themselves to be Democrats. Members of Democrats Abroad may also be members of a local Democratic Country Committee or organizing committee existing in the respective country or defined geographic area in which such member resides or works.

Democrats Abroad Germany (DAG) is one of Democrats Abroad’s largest County Committees, comprising nearly 16,000 members across 14 local chapters throughout Germany. Due to its size and the importance of Germany itself in international and economic affairs, DAG is of particular strategic significance for Democrats Abroad. Kenton Barnes is the elected Chair of DAG, leading all of the Democratic Party’s efforts in the country. In this role he is responsible for managing all country-level activities as well as providing supervision and support to the local DAG chapters. He is supported in this responsibility by Emily Lines, the elected Vice Chair of DAG, who also happens to be the President of the Germany chapter of the IU Alumni Association. Jonah Otto is the elected Vice Chair of the DAG Munich Chapter and co-leader of the DAG Augsburg Precinct, providing strategic and leadership support to the voter engagement efforts in Munich and southern Bavaria. He is also a researcher and teaching fellow at Universität Augsburg (an O’Neill School partner, near Munich), facilitating all of the international activities for the Department of Management and Organization at

the university. Kaitlyn Kennedy is the Communications Coordinator of DAG who is responsible for all internal and external communications, marketing and advertising duties. Teresa Ritterhoff is the Get Out The Vote (GOTV) Coordinator for DAG who is responsible for all matters related to grassroots voter registration efforts in the country. Kaili Morris is the DAG Caucus Coordinator, providing leadership and support to the assorted DAG caucuses which serve as engagement and empowerment platforms for the various policy issue interest groups within DAG's membership.*

**The specific activities of these individuals are delineated further in the appendices.*

DAG is chiefly concerned with identifying and engaging American citizens living in Germany and empowering them to exercise their right to vote in U.S. elections and participate in the U.S. political process. DAG creates value for its membership by providing opportunities to exercise their political voice through voting resources, events and rallies, volunteerism and appealing to Congress and State Legislatures on policy issues concerning members.

The IU capstone students will collaborate with Kenton Barnes and Jonah Otto, along with their colleagues in the DAG Executive Committee, to provide detailed and specific analyses and recommendations on:

- (1) Developing a complete fundraising and financial assessment for the organization, identifying and refining approaches to revenue stream diversity and bookkeeping practices*
- (2) Creating a strategic analysis of DAG "Caucus System" for active member engagement, identifying areas for collaboration and expansion throughout DAG*
- (3) Identifying opportunities and enhancements to DAG's "Get Out the Vote" (GOTV) strategic initiatives leading up to the 2022 US Midterm Elections*
- (4) Producing a thorough communications and advertising assessment for DAG as they attempt to maximize expenditure efficiency to most effectively reach potential voters/members leading up to the 2022 US Midterm Elections*

**Detailed task descriptions can be found in the appendices of this document*

The project will be integrated with an analogous master level capstone course being taught by Jonah Otto, at the Department of Management and Organization of Universität Augsburg. Each task Group working on a specific aspect of the Capstone Project will include at least one master student from Germany. Project and Task Group work with the Clients and German team members will take place via Zoom and email. Representation for the Clients plan on flying to Bloomington for the final presentation of the project report.

Students will have the option of travelling to Germany during spring break 2022 to work on various aspects of the Capstone Project in general, and their own task groups in particular. This will afford them the opportunity to interface directly and in person with the Clients and associated staff and to work in person with their German team members and present progress reports for their work, as well as conduct in-person interviews and procure the requisite material for their analyses.

There will be two main venues in Germany – The University of Augsburg and the Indiana University Europe Gateway in Berlin, along with a number of short excursions for site visits. The overseas schedule in Germany is:

Saturday, March 12 – Arrival in Augsburg

Orientation & Introductions

Welcome Dinner

Sunday March 13 – Meeting with Clients, Augsburg Precinct

Task Group Progress Reports and Feedback from Clients

Analysis of Initial Results

Planning Interviews

Individual Task Group Work

Monday March 14 – Day Trip to Munich

Meeting with the DAG Munich Chapter Board

Individual Task Group Work

Tuesday March 15 – Field Work – Landsberg, Kempten, Füssen

Member Engagement and Survey/Interviews in southern Bavaria

Individual Task Group Work

Wednesday March 16 -- Travel to Berlin

Travel to Berlin

Orientation at the Indiana University Berlin Global Gateway

Individual Task Group Work

Thursday March 17 – Meeting with Clients

Meet with DAG Leadership and Caucus Leadership

Meet with DAG Berlin Chapter Board

Individual Task Group Work

Friday March 18 – Field Work – City of Berlin

Member Engagement and Survey/Interviews in Berlin districts

Individual Task Group Work

Farewell Dinner

Saturday March 19 Departure

Additional Expenses for Overseas Travel to Germany

Additional costs incurred in the overseas travel component would be approximately \$100 per student for transportation to interview venues in Augsburg and Berlin and for the train from Augsburg to Berlin. Accommodation expenses are estimated at \$75 per night per student. The work space will be

provided at no cost by Universität Augsburg and the Indiana University Global Gateway in Berlin. Some meals may be paid for by the Department of Management and Organization of the University of Augsburg.

Students are responsible for their own transportation to and from Germany. The Department of Management and Organization will provide assistance for instructor travel and accommodation, as possible.

This capstone course will provide students the opportunity to work with complex organizational and community problems and to engage directly with a high-impact non-profit organization, as well as its various stakeholders. Students will apply policy analysis skills, design and carry out research, gain an understanding of a non-profit organization's operational, managerial and strategic challenges and propose new managerial and organizational practices along with specific strategies to enhance the impact and effectiveness of the organization. The course will also provide opportunities to develop project and team management and analytical skills as well as apply professional oral and written communication skills. The capstone in particular adds an international and multicultural competence skill building component by focusing on an international client and integrating students from the University of Augsburg into the Indiana University O'Neill School student teams.

The V600 Capstone courses are intended to address topics that integrate public policy, management and science/technology in an interdisciplinary framework. The expectation is the class will involve a group project that requires students with very different backgrounds and skills to work together in a collaborative learning format. The course is a capstone for the core curriculum rather than a concentration element and deals with interdisciplinary, interrelated issues that generally arise in the professional positions students are expected to obtain after graduation. In keeping with these objectives, this section of V600 is intended to integrate a wide variety of previous coursework, including both the core curriculum of the MPA and each student's individual concentration areas.

Appendix A) DAG Fundraising and Financial Assessment

Democrats Abroad Germany (DAG)

Contact: Emily Lines, Vice Chair

vicechair@democratsabroad.de

<https://www.democratsabroad.org/de>

As an all-volunteer organization, Democrats Abroad Germany relies on the financial donations of members to pay for materials, organize events, and to achieve its overall goal of getting out the vote. There are several ways in which we fundraise:

- Ask for donations at events (pass around a collection can at in-person events)
- Sustaining donations
 - Members can set up a recurring donation/bank transfer to donate to DAG on a regular basis
- Offer DA merchandise

- We create buttons, tote bags, t-shirts, etc. that are available to members for a donation (PBS/NPR model)

Beginning with general donations, Democrats Abroad and DAG are successful in fundraising, especially during election years. There is interest and awareness among members to support our efforts to get out the vote and people are invested in making sure Democrats win. As can be expected, in so-called off-years, fundraising levels decrease, but we still have outstanding expenses that we have to cover. We also continue hosting events and distributing materials to inform people on how to register to vote and request their absentee ballots.

In addition to basic asks for financial donations, DAG also offers merchandise in exchange for donations. To help lower the costs associated with ordering merchandise, DAG created a co-op. This simply means that we work with other Democrats Abroad Country Committees (CCs) to be able to buy items in bulk at a lower cost. For example, when ordering t-shirts, we ask other CCs if they are also interested in purchasing t-shirts so we can submit a large bulk order to receive a lower price per shirt. The items are then sent to the CCs so they have them for their local members. DAG charges other CCs the at-cost price for the items, plus shipping, to cover the costs of the items.

To better track our inventory and make it easier to send invoices to other CCs for their merchandise orders, we began to use QuickBooks in 2017. This has been an effective tool to help us send invoices to CCs for their co-op orders and to members when they ordered items or tickets for events. However, we would like to work on improving how we use QuickBooks or even re-evaluate if this is an appropriate tool for our needs.

Due to the COVID-19 pandemic, we had to find a way to improve how we made merchandise available to members since we were not having in-person events. In the past, we used Google Forms to host order forms that we created, but this did not keep a running total as people ordered and separate invoices still had to be prepared once an order was placed. In 2019/20, we moved to Formsite, an online platform that allows us to create order forms and better track our inventories. The platform is able to keep a running total, send automatic reminder/confirmation emails with the payment information, and help ensure that people that place orders actually follow through with their donations. We also used the platform to take orders from all DA members and have been sending materials worldwide. The platform is still not ideal for our needs and there are areas where we can improve. Its biggest weakness is that forms cannot be linked. Therefore, we have to keep track of two inventories and make sure they correspond to each other instead of having the ability to take from one central inventory.

To make sure that we are able to carry out all the activities we have planned for 2022, we want to be effective in our fundraising. Therefore, we would like to:

- Find out how we can improve and strengthen our fundraising efforts
 - How can we get more sustaining donors?
 - How can we improve our fundraising efforts in off-years?
 - Is there a way to make our merchandise more appealing?
- Specifically work to improve how we handle our merchandise/co-op
 - What are tools that we can use to better track our inventory (linked inventories via multiple forms)?

- Is there a strategic way to go about ordering items or determining how much of an item should be ordered?
- How can we best plan and decide what merchandise we should try to offer?
- Is there a way to improve merchandise distribution internationally?
- Determine if QuickBooks is an effective tool for our organization
 - Are we using QuickBooks efficiently?
 - How can we tailor QuickBooks to better suit our needs?

Appendix B) Strategic Analysis of DAG Caucus System

Democrats Abroad Germany (DAG)

Contact: Kaili Morris, Caucus Coordinator

caucus@democratsabroad.de

<https://www.democratsabroad.org/dag-caucuses>

Background

The Democrats Abroad Germany Caucus Committee was established in April 2021. It consists of approximately 25-30 volunteers. The Caucus Coordinator, a (non-voting) member of the Country Executive Committee, and leadership groups of various sizes for each of the caucuses. Currently, there are eight active caucuses in DAG working to engage members through events, educational information dissemination, calls to civic action and social community building. Caucuses have the potential to activate and engage members in a unique way by focusing on specific, issue-related policies, candidates and actions.

Going into August 2021 we held 10+ online events including online trivia nights, notable speakers, and calls to activism, we launched an entirely new Caucus, and by the end of September hope to have 9 active DAG caucuses.

Democrats Abroad Germany (DAG) boasts a membership of nearly 16,000 people but less than 3,500 are recorded as Caucus members or volunteers. Growing our membership rate would be one of the several tasks we would like to explore in partnership with a student group.

Current goals of the DAG Caucus Committee

- Create and actively use blogs pages
- Use caucuses to engage young voters and dual citizens
- Find volunteers for every caucus
- Prepare for 2022 – What will our role be? How can we plan ahead?

The goals of our partnership with Indiana University would be to assess the ways in which the DAG Caucus Committee can be most helpful in:

- supporting the objectives of the Country Committee,
- effectively serving the needs of our members and,
- growing our membership

What we would like to do:

- Establish Best Practices
Since the Caucus Committee is so new, we are interested in doing a program analysis to evaluate what we are doing well so far and what we can improve on.
- Member Survey
We want to know what our members are here for and what members know. Caucus work is currently geared toward participatory events so we need to know what events members are interested in or not. We also want to know what people expect to get out of their DA membership and what feedback they have to offer now.
- “Inter-” Organizational Cooperation Assessment
We would like to identify the best ways that caucuses can work together and with other arms of the DAG organization.
 - Are there places where it makes more sense to work together?
 - Can we use all of our members to leverage our total membership to benefit the organization or create political change? (I.e. civic actions, raising awareness, fundraising)

Appendix C) GOTV Opportunity & Growth Analysis

Democrats Abroad Germany (DAG)

Contact: Teresa Ritterhoff, Get Out The Vote (GOTV) Coordinator

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<https://www.democratsabroad.org/de>

Problem Identification:

Democrats Abroad Germany currently boasts approximately 16,000 members and services an additional (unknown) number of American citizens with their voting assistance needs, yet most estimates put U.S. citizens in Germany at about 120,000 (non-military). Even assuming that up to 50% or more of these Americans do not self-identify as Democrats, there seems to be plenty of room for membership growth.

We would like to ask for your analysis of, and recommendations for, how we can best:

1. Identify potential members
2. Reach out to them effectively
3. Retain or win as members and voters whom we assist with ballot request/return
4. Retain members long-term and/or maintain an alumni network while remaining GDPR (EU data privacy regulation) compliant
5. Coordinate with state and county parties in the U.S. to attain access to their overseas voter data (would involve both Global and the DNC)

What are the most/least effective:

- means of locating/identifying/recruiting Americans (voters/Democrats)
- means of targeting specific groups (military, dual citizens, university/exchange students...)
- tools of communication with (prospective) members (mail, email, calling, social media)
- events/offerings proven to attract/retain members
- networking opportunities (community/academic/military facilities and institutions)
- marketing and advertising approaches and media (crossover with Communications team)

We are looking for both “hard” (data-driven) and “soft” (cultural/internal) analyses.

Appendix D) DAG Communications and Advertising Assessment

Democrats Abroad Germany (DAG)

Contact: Kaitlyn Kennedy, Communications Coordinator

communications@democratsabroad.de

<https://www.democratsabroad.org/de>

Problem Identification: The Democrats Abroad Germany (DAG) Communications Team, in coordination with the DAG GOTV Team, would like the Indiana University students to analyze our advertising and outreach efforts with the goal of helping us best invest the money we have budgeted through the 2022 midterms.

Background

Democrats Abroad (DA) is an entirely volunteer-run and volunteer-funded organization. One of our primary functions is to get out the vote ahead of critical elections, mainly through our non-partisan service Vote From Abroad (VFA). Globally, we had great success in boosting VFA usage during the last major election cycle, but with Americans abroad still 13 times less likely to vote than U.S. citizens stateside, per FVAP’s Overseas Citizen Population Analysis, there is a lot more work to be done.

Within Germany alone, we have around 16,000 DA members. However, we know that there are at least 120,000 American citizens living in the country. We witnessed remarkable growth leading up to the 2020 presidential election, but that is only the beginning. With new measures restricting voting being passed in several state legislatures, reaching these pockets of overseas Americans and providing them the support they need to vote is crucial to guarantee ballot access and ensure further electoral successes.

When Americans abroad vote, we make a big difference. Evidence suggests we were the Democratic margin of victory in key 2020 elections, including the Georgia Senate run-offs. As we look toward the 2022 midterms, we want to capitalize and expand on those successes, particularly by reaching underrepresented groups of voters, including youth voters, voters of color and dual citizens. One of the primary ways we can reach new voters is through advertising, particularly online advertising. In the age of the pandemic and our increasingly digital world, online communications and outreach will be many people’s first exposure to Democrats Abroad Germany. We want to make sure that

advertising and outreach draws people in, first and foremost, to vote and seek assistance as needed, with the secondary goal of growing our membership and donor base.

Project Proposal

To that effect, we would like the Indiana University team to help investigate the following questions:

- What types of ads are the most effective?
- Do we get greater returns from putting more money into fewer ads or less money into more ads, or something in between?
- What is the best time to reach people before an election?
- What would an effective ad schedule look like given our budget?
- Are our ads translating into Vote From Abroad usage?
- How can we best personalize ads for different target audiences (e.g. military, students, dual citizens, business professionals, etc.)?
- How can we better target our social media content on different channels to reach different target audiences, especially given the limitations of our small volunteer teams?
- How can we make our ads and social media outreach translate to DAG membership growth and donations?
- Are there any strategies we are overlooking? Is there anything we are missing that could help round out our portfolio?

We plan to use the insights we gain from the project to determine how we invest our resources for advertising in the remaining months leading up to the 2022 midterms.