

The original documents are located in Box 63, folder “10/14/75 - To Bo Callaway - Polling Proposal, Market Opinion Research (MOR) Contract Proposal, Cost Estimates, and Budget for Primary States Polling” of the Robert Teeter Papers at the Gerald R. Ford Presidential Library.

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MARKET OPINION RESEARCH

TO: Howard H. Calloway
FROM: Robert M. Teeter
RE: Campaign Polling from Present Time to National Convention
DATE: October 14, 1975

This memorandum has two purposes. First, to outline the types of polling data I think President Ford's campaign will need between now and the convention and how that data can best (and least expensively) be obtained under the new campaign laws. Secondly, to propose Market Opinion's involvement in the campaign polling program.

While this memorandum only covers the period between now and the Republican National Convention, two of the three elements I am recommending could be extended through the general election without any loss of continuity.

I think there should be three basic elements to the polling program.

1. Primary State Polls

As you know, in-depth personal interview studies are now in the field in New Hampshire and Florida and final reports will be delivered to you the first week in November. I do not think any additional primary polls should be started until we see the data from these two. Once we see this data we should be able to reduce the length of the questionnaire, and thereby the cost, for subsequent primary state polls.

It is impossible to recommend which primary states should be polled without knowing whether The President is going to have a serious challenge, which states we are thinking of running a full blown campaign in, and if there is a serious challenge how long it lasts.

I do think however we should, assuming a Reagan run in New Hampshire and Florida, plan on doing short telephone follow-ups about the first of the year and possibly again about two weeks ahead of the primary elections.

Also we should plan on doing moderate length telephone polls beginning in mid-November in those states you are considering running full scale campaigns if Reagan runs. Approximate costs and a draft questionnaire for those states are attached. It would be helpful if you could indicate which states you might want to poll so the sampling procedures could begin.



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The only states where we may need to go in with long personal interviews are the large ones (New York, California) if we find we are in a tight race and those with small numbers of Republicans for sampling reasons.

2. National Polls

In the past, in-depth candidate perception and issue data was collected for all the target states. This amount of state data is unnecessary as it tends to be very similar by region and would be prohibitively expensive under the new spending limitations. Therefore, I recommend the detailed issue and candidate perception data be obtained in two national personal interview polls, with some oversampling so we have reliable data for each of the nine census regions. These polls would provide the speechwriters, advertising agency, White House staff, and others concerned with the substance of the campaign with the data they need.

The first of these national polls should be started immediately for delivery in early December and about 75-80% of it should be concerned with issues and the remainder with the perception of the President. The general areas to be covered are:

- What issues concern voters.
- How intense is this concern.
- What do they think should be done about the issue.
- Test alternative solutions.
- General perception of performance of President and Congress.
- Identification of President and Congress with specific proposed solutions.
- Identify key elements of Presidency.
- Identify positive and negative elements of President's perception.
- Determine level of knowledge about issues and President.

The second of these national polls would be at the end of the primary season when President's perception was better set and a Democratic candidate was obvious or at least the list had been reduced to two or three.



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The design would be the same as the first poll except that 75-80% of the emphasis would be on candidate perception and 20-25% on the issues. This would be the major source of data for the advertising agency after the primaries.

Both of these would have base samples of 1500 with some oversampling in the smaller regions. The cost would be \$51,000 for each national poll, not including the oversample.

Note: It is possible that one or both of these polls could be eliminated or their scope reduced if the Republican National Committee conducts the national polls it has planned and makes them available to the President's campaign.

3. Target State Polling

The Presidential election is actually the composite of fifty-one state elections and the most basic strategic decision is which states to concentrate the campaign's resources on to produce 270 electoral votes. Individual state polls are critical both for the selection of the target states and for the development and execution of campaign plans within those states.

Optimally, two waves should be done in 15-20 of the larger potential target states in January-February and May-June. While the spending limitations makes it impossible for the campaign to do this much polling I think most of this data can be obtained by taking advantage of polling done by state committees and campaigns. This could be encouraged by sharing in the costs. As I mentioned before, I don't think the campaign needs a great deal of information from these states but rather a regular reading on the head-to-heads, local issues, and the state races. All of this data will be included in most state polls.

The campaign committee should have a system by which it keeps track of what polls are being done and collects and analyzes the Presidential and national issue data from them. Most of this data is readily available for the asking from state chairmen and/or candidates.

It should also develop some standard questions which state people can be encouraged to include in their polls which would give the Ford campaign some comparable data from state to state, and the ability to test specific things in individual states from time to time.



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Lastly, it should be willing to negotiate various cost sharing agreements with state organizations where they want specific data or the addition of a couple of thousand dollars will get a poll done that otherwise would not get done.

This system has several advantages, most important it saves the campaign alot of money, most of the target states are the areas that have good regular polling programs, and properly handled it can create alot of good will. The disadvantages are that we will have to bend to the timing of the states and that there is an increased security risk (although I have not had this problem in the past). Also it needs to be done carefully in order to avoid any questions of its legality.

It is impossible to budget for this portion as we don't yet know how much free data will be available, how much we'll have to put into cost sharing, and how many of these states we will have to do on our own. However, if we assume a list of 18 target states and assume we get free data from 10, that we have to share some of the cost in 5, and do 3 on our own, a budget of \$60-80,000 might be reasonable.

Analysis of Data/Project Management

The polling program is going to generate a tremendous amount of data and it is extremely important that the campaign have a system for handling it that will maximize its use. Such a system has three elements.

1. Administration

There needs to be one person who is responsible for the administrative functions - scheduling, negotiating shared cost arrangements with state committees, and keeping track of the other administrative elements. This is much more of a job than it appears because it will involve allocating costs between the Ford committee and the state committees, and keeping scrupulous records of those arrangements to prove they are legal.

2. Analysis

The analysis function involves both developing and maintaining a filing system so that all available polling data, including the public polls, are accessible and in a common format and doing various types of secondary analysis on the data. This would



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include trend analysis, aggregate analysis, and various types of multivariate, or statistical analysis. This function needs to be performed by a skilled survey research analyst with continuous access to a computer.

3. Interpretation/Communication

A third function is the interpretation of the data in terms of its campaign implications and the communication of this to the campaign leadership and others in the campaign and White House who have responsibility for speechwriting, scheduling, advertising, organization, etc. While this is closely related to the analytical function and may be ultimately combined with it, I see it as a somewhat different function.

In 1972 I was responsible for all of these functions and had a staff of five full-time people to assist me in Washington. Based on this experience I think most and probably all of these functions can better be handled in a survey research company than in a campaign headquarters. Several different types of people are needed to handle these functions, all with some experience and expertise in handling data but most of them are not needed full-time.

For these reasons I propose that the campaign contract with MOR separate from the actual polling for the co-ordination of the polling program and the secondary analysis of the data. This would essentially be a staff and computer time agreement.

Under this arrangement we would communicate regularly with the various state committees, other polling companies, and the public pollsters (Gallup, Harris, Sindlinger) to collect all available data, negotiate shared cost arrangements with some state committees, and document all of the arrangements under which the Ford Committee receives data.

We would also develop a formatting and filing system so that any or all of the data on hand could be easily accessed and used by the company staff. We would keep duplicate sets in our Detroit headquarters and update them at least weekly now and continuously later in the campaign. This system would also provide regular trend charts and summary tables.



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As the amount of data on hand increases we will do a variety of multivariate analysis to identify factors influencing the President's perception that are independent of the traditional party influences. There are a number of analytical techniques available that can give us insights into the President's support that do not appear in straight cross-tabs.

Lastly, we would be available to work with you interpreting the polling data for those involved with speechwriting, scheduling, advertising, organization, etc. This would be done both by writing campaign implementation memos and participating in meetings and briefings.

Budget

Two factors make it difficult to develop hard budget figures. First, we don't know if there will be a serious primary challenge, how long it will last if there is one, and how many states the Ford campaign will make an all out effort in. Secondly, we do not know yet which states will make data available to the committee, how many the campaign can work out shared costs arrangements with and how many the campaign will have to finance itself.

Because of this, I am attaching a cost estimate for each of the primary states. I am not, of course, proposing the campaign poll in all the states but rather submitting it for your information pending more information about what states you intend to poll.

I am also attaching a draft budget summary which is based on a number of assumptions and therefore should be taken only as a guideline.

For the administration and analysis of this polling data I propose we begin to develop the systems needed immediately and bill you \$2,000 a month plus authorized travel expenses, beginning November 1 and running through January 30, and review this arrangement at that time. If we are involved in a number of contested primaries we would increase the fee to \$2,500 or \$3,000 a month depending on the amount of work. If the primaries are not going to be seriously contested, we would continue at the \$2,000 level until June 1 when it would be necessary to review it again. My experience has been that from June on there is a great demand for analysis and interpretation of the data.



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DRAFT BUDGETPrimary Polling

New Hampshire	\$15,000
New Hampshire follow-up	7,500
Florida	18,000
Florida follow-up	<u>10,000</u>
	\$50,500
Additional primary polling ¹	\$108,800
National polls	\$102,000

Target State Polling \$60,000

Data Handling and Analysis \$24,000

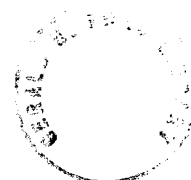
\$2,000/month, November-January

\$3,000/month, February-July

Total Primary Polling \$345,300

¹ Assume short telephone ten states (e.g. Massachusetts, Illinois, Wisconsin, Pennsylvania, Indiana, Maryland, Oregon, Georgia, Tennessee).

Assume long telephone in New York and California.



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<u>State</u>	<u>Primary Date</u>	<u>Sample Size</u>	<u>Short Telephone</u>	<u>Long Telephone</u>	<u>Personal</u>
New Hampshire	2/24	500	\$7,500	\$11,000	\$15,000
Massachusetts	3/2	500	7,500	11,000	16,500
Florida	3/9	600	8,400	12,600	18,000
Illinois ^a	3/16	600	8,400	12,500	18,500
N. Carolina	3/23	500	7,500	11,000	16,500
New York	4/6	800	10,400	16,000	24,000
Wisconsin	4/6	500	7,500	11,000	16,500
Pennsylvania	4/27	600	8,400	12,500	18,600
Texas	5/1	600	8,400	12,000	20,000
Georgia	5/4	500	7,500	11,000	16,500
Indiana	5/4	500	7,500	11,000	15,000
Wash. D.C.	5/4	300	5,700	7,500	12,000
Tennessee	5/6	500	7,500	11,000	16,500
Louisiana ^a	5/8	300	5,500	7,500	12,000
Nebraska	5/11	400	7,200	11,000	16,500
W. Virginia	5/11	400	7,200	11,000	16,500
Maryland	5/18	500	7,500	11,000	16,500
Michigan	5/18	600	7,500	11,500	17,000
Idaho	5/25	300	5,700	7,500	11,700
Kentucky	5/25	400	7,200	9,400	15,000
Nevada	5/25	300	5,700	7,500	11,700
Oregon	5/25	500	7,500	11,000	16,500
Rhode Island	6/1	300	5,500	7,500	11,500
Arkansas ^a	6/1	400	7,200	9,400	15,200
Montana	6/1	300	5,700	7,500	11,700
S. Dakota	6/1	300	5,700	7,500	11,700
N. Mexico ^b	6/1	300	5,700	7,500	11,700
California	6/8	800	10,500	16,000	25,000
New Jersey	6/8	600	8,400	12,000	18,600
Ohio	6/8	600	8,400	12,000	18,000
Alabama ^a		400	7,200	9,400	15,200
Mississippi ^a		300	5,700	7,500	12,000
Washington ^a		300	5,700	7,500	12,000
Vermont ^a		300	5,500	7,500	11,500

^aTentatively planning a Primary - not yet confirmed.

^bConvention in March.

