

A man wearing a light-colored cap and a light-colored shirt is seen from the side, holding a microphone and addressing a large, dense crowd of people. The crowd is composed of many individuals, many of whom are wearing similar light-colored caps. The background shows a cityscape with various buildings under a clear sky. The entire image has a reddish-orange tint.

**scl** group

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KENYA: THE PATH TO 2017



**scl**group



*SCL Elections has an unrivalled track record in political campaign management. For over 25 years we have worked on more than 100 campaigns across 5 continents.*



*SCL Commercial is specialist in providing behavioural research methodology to the commercial worlds of advertising and marketing.*



*SCL Defence is a leading practitioner in behavioural conflict resolution - Information Operations or PSYOP (psychological warfare).*



*SCL Social is a behavioural research agency that seeks to replace creativity with science in addressing communication campaigns that really matter.*





# CONTENTS

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Challenges and Opportunities	6
Proposal Summary	7
Component 1 Perception Survey	8
Component 2 Strengthening of Party Organisational Infrastructure	10
Component 3 Membership Card Programme and Associated Database	12
Additional Proposed Services	14
Appendix A Core Project Team	16
Appendix B Case Studies	18
Appendix C References	20
Appendix D Survey Methodology	22
Appendix E Indicative Budget	24
Appendix F Indicative Timeline 2015-2017	25
Appendix G RIPON System	26

# CHALLENGES AND OPPORTUNITIES

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For any incumbent administration, the halfway point between elections presents an opportunity to evaluate the experience gained over several years in government. The TNA/Jubilee administration has taken bold action to address the issues facing the people of Kenya during its time in office, and has made substantial progress on tackling issues of security, poverty, education, and infrastructure.

Yet despite this progress, local and international media and the country's political opposition continue to criticise the government from the sidelines. Breaking through the noise, misinformation and fear to reassure the populace that government cares is a challenge all administrations must address, and identifying how ordinary Kenyans across the country really feel about their government will be key to consolidating public support in advance of the 2017 elections.

## **SCL can help you do this.**

How to rapidly identify your supporters and opponents and then engage them in the most effective manner is one of the key challenges faced by political leaders. Overcoming this challenge requires knowledge of what the population cares about and how they think, an understanding of how to communicate with them and the infrastructure required to ensure that your messages reach your audience and change their attitudes and behavior. A world leader in developing and implementing influence and voting behavior strategies, SCL Elections knows what it takes to win elections and then how to remain effectively engaged to better govern with public support.

Successful political organisations are inherently connected to their supporters, and SCL can help make such a connection between the TNA/Jubilee and the people of Kenya a reality. A majority of Kenya's electorate chose the Jubilee Alliance in 2013, but voters have short memories and while the 2017 election may seem far off, now is the time to begin building towards a second historic victory.

Following discussions with key individuals close to the presidency, SCL proposes to commence that effort by undertaking a national county-level survey of sentiment and political opinion amongst the Kenyan electorate. This survey will generate a massive amount of data outlining the things that Kenyans care about, and how their support for the government can be maximised whilst minimising support for the opposition.

Once the initial stages of this survey have been completed, SCL will also undertake a comprehensive audit of TNA/Jubilee Alliance organisational capacity. Though it remains unclear at present whether the Jubilee should be proceeding as a coalition or if it should coalesce into a formal party, the national survey will provide guidance on how to proceed and the organisational capacity audit will enable the design of a comprehensive plan to turn the organisation into an effective campaign machine.

Following the completion of these workstreams, the TNA/Jubilee will have complete data on the Kenyan population and a strategic communications plan for engaging them, as well as well-functioning communications and voter mobilisation units at all levels from national down to local branches. In other words, it will be an organisation with everything it needs to contest and win elections in 2017 and beyond.

# PROPOSAL SUMMARY

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Preliminary discussions indicate that SCL would add value and support in the following areas:

## 1. PERCEPTION SURVEY

A nationwide survey will enable SCL to provide TNA/Jubilee with an in-depth understanding of the Kenyan population's attitudes on security, governance and other key topics. Also provided will be a series of strategic communications recommendations, which will help TNA/Jubilee to mitigate negative news coverage and promote positive sentiment amongst the voting population of Kenya. This survey will also provide guidance regarding the future nature of the organisation, particularly whether it should be contesting elections in its current form as a coalition or if a merger to form a single party would be advantageous. Additionally, the research programme will allow SCL to advise the government on the planning and implementation of policies and infrastructure projects where they are most needed.

## 2. STRENGTHENING OF PARTY ORGANISATIONAL INFRASTRUCTURE DOWN TO LOCAL BRANCH LEVEL

Political organisations that want success and longevity in the modern campaign environment must be well-organised and structured in such a way that they are able to coordinate activities at all levels. SCL proposes to undertake a thorough review of the management structure, information systems, human resource capabilities and IT capacity of the TNA/Jubilee Alliance. Our party organisation specialists will conduct a holistic assessment, and will then provide actionable recommendations regarding areas for improvement. Training and organisational learning materials will also be provided, so as to ensure that the party can continue to develop its own capacity going forward. SCL can also provide communications support on a retainer basis, with experienced experts embedded with TNA/Jubilee staff to provide communications support and build organisational capacity.

## 3. MEMBERSHIP CARD PROGRAMME AND ASSOCIATED DATABASE

SCL can design and implement a membership card programme for party supporters, which will provide a valuable tool for engaging voters and tracking their participation in party activities. Gamification strategies will incentivise greater participation in events, canvassing and supporter activation efforts, creating a mobile army of millions that can be contacted almost instantly whenever required and deployed when necessary.

This membership card scheme will be provided with a database tool using RIPON, our voter engagement system. RIPON provides an interface that allows users to contact supporters, track their interactions with the party and manage volunteers, and the system will turn the TNA/Jubilee from an informal collection of supporters into a united force of political organisers and activists.

## 4. ADDITIONAL PROPOSED SERVICES

SCL can also support other functions of the TNA/Jubilee via additional services, which could include support for media relations, tracking polls to generate feedback on messaging so that campaigns can be adjusted as required, international press relations to address criticism of the Kenyan government and holistic campaign support such as events management and voter mobilisation.

The menu of service options can be reviewed during the course of the organisational capacity audit, and the services that will add the most value can be selected and implemented over the months leading up to the 2017 elections.

# COMPONENT 1

## PERCEPTION SURVEY

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In 2012, SCL undertook the largest programme of political research in Kenya's history in support of the TNA/Jubilee campaign for the Presidency. Now that several years have passed, it is time to conduct a similarly thorough investigation of public attitudes to the incumbent government. This study will provide insight into public attitudes on the government and its constituent parties, as well as indicating what the people of Kenya want to see from their government before the next election in order to consolidate their support.

Such insight cannot be gained from media reviews; a more balanced 'temperature check' is required to truly measure public sentiment and levels of support.

SCL will undertake a nationwide county-level survey of the Kenyan population's attitudes and investigate their views on the government's responses to important issues. The survey will focus on topics of significance to the administration such as policies on education, employment and healthcare, as well as investigating the modalities of public communication in Kenya.

SCL will also seek where possible to integrate its knowledge of psychological profiling into this research in order to give the strategic communications recommendations the greatest possible chance of successfully influencing voters' behaviour. In areas like Nairobi and other areas where sufficient data is available on the population, SCL will conduct psychographic personality profiling studies in order to provide psychologically salient messaging targetable to particular mental profiles.

This research programme will involve teams of SCL field researchers and local partners travelling to each of Kenya's 47 counties to interview a

nationwide total of c. 47k respondents. This will provide a sample representative at 99% confidence level with a confidence interval of 0.6, a margin of error significantly lower than that provided by traditional political polling.

SCL will also undertake a complementary qualitative research programme that will involve an appropriate mixture of In-Depth Interviews and Focus Groups. This qualitative phase will provide important insights that will allow our political communications strategists to contextualise the quantitative survey and design appropriate communications strategies.

Taken together, the qualitative and quantitative research programmes will provide a huge quantity of data that will be analysed using SCL's proprietary methodology to identify target audiences and their views on the TNA/Jubilee government.

SCL's analytical methodology employs a holistic suite of data analysis techniques, applied by our team of statisticians and data analysts. This process has a proven track record of producing topical, actionable insights that can shape engagement and communications strategies.

The product of this survey and analysis will be a full report that will contain concrete, practical strategic communications recommendations divided by geographic, ethnic and other factors. The strategic communications campaigns outlined by our research will provide the TNA/Jubilee with an actionable plan regarding who to target, what to say to them and how to say it, and collectively these campaigns will form the foundation for a successful election campaign in 2017.



## PERCEPTION SURVEY

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**OBJECTIVE:** To provide the TNA/Jubilee with up-to-date insight into the population and an actionable communications strategy

- This research programme will provide the government with a roadmap for the next two years, including recommendations on party branding, candidate selection, locations for infrastructural development and the other information it needs to build a solid foundation for victory in 2017
- Study will involve a survey of 47,000 Kenyan citizens that will be representative of the population according to geography, ethnicity, political affiliation and other factors, as well as focus groups and interviews in key areas
- Desk-based research of secondary sources and an examination of SCL's previous research in Kenya will allow our researchers to design a survey and data collection schedule that will ensure predictive validity
- SCL's data scientists and political analysts will use the raw data from the survey and secondary sources to provide clear insights and actionable recommendations that will enable the TNA/Jubilee to communicate more effectively with key population groups and win greater public support

### Estimated Cost

\$1,660,430

## COMPONENT 2

### STRENGTHENING OF PARTY ORGANISATIONAL INFRASTRUCTURE TO LOCAL BRANCH LEVEL

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Winning modern elections requires political parties that are capable of mounting complex, coordinated nationwide campaigns. This operational organisation must extend from the highest levels of party leadership to volunteer coordinators in local branches to ensure that resources are deployed effectively and that talking points are clear and uniform. Achieving this level of organisation requires human resources, information management systems and organisational processes that are capable of facilitating a national effort, and it is never too early to begin (re)structuring a party organisation to ensure it is prepared to achieve electoral victory.

In advance of the 2013 Kenyan election, SCL devised a research-led campaign strategy and communications plan that led to the creation of the TNA/Jubilee brand. Building on this foundation, it is important that the party continue to fundamentally strengthen over the coming years to create a solid basis for victory in advance of 2017.

Across countries and continents, SCL has extensive experience designing strong frameworks for political organisations, delivering solutions and advice on the recruitment, training and operational processes necessary to achieve electoral success. Our work in the USA, Latin America, Africa and the Caribbean has involved extensive initial planning and reorganisation of political parties, and we have a significant and successful track record of building capacity amongst political organisations.

This process will involve a thorough audit of existing party capacity as a basis for defining a strategy for building an organisation capable of delivering victory in the future. Our experienced political management specialists will assess existing infrastructure and management processes in a holistic review of human resource needs, operational procedures requiring improvement and identification of training or other forms of capacity building that can be provided to staff and volunteers.

The result of this effort will be a comprehensive strategic plan and associated training materials that will enable the party to achieve more effective and organised outreach and engagement with voters, donors, volunteers, party members and staff. If gaps in key positions are identified, SCL will facilitate the recruitment of experienced individuals to fill these vacancies.

The design of this strategic plan will also be informed by the results of the nationwide sentiment survey, particularly with regards to geographic areas and/or populations identified by the research as requiring special attention. The sentiment survey will also provide guidance regarding the future of the Jubilee Alliance, and recommendations regarding whether the Alliance should be maintained as a coalition of distinct parties or composited into a single organisation will be actioned during the organisational capacity building project.

While the audit is being undertaken, SCL can also provide a team of communications consultants that will begin rapidly building the organisation's communications capacity. Experts in political communications and media relations management, our specialists can produce any and all required communications materials, whilst also integrating new systems and skills into the party's existing communications framework. Eventually the party will have a communications unit capable of producing the highest quality materials without support, and as with other facets of this capacity building exercise the end goal is to create a party organisation capable of doing everything without recourse to external support.

A stronger party organisation means stronger messaging to voters, stronger engagement campaigns at election time and can translate into stronger support from the public. Political organisations capable of mounting nationwide coordinated campaign efforts achieve greater results with less expenditure, and the development of TNA/Jubilee's internal capacity should be a priority in advance of 2017.

## STRENGTHENING OF PARTY ORGANISATIONAL INFRASTRUCTURE

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**OBJECTIVE:** To make the TNA/Jubilee an organisation capable of mounting efficient, powerful national campaigns

- Assessment of current infrastructure and party management processes
- Design of improved party framework, organogram and customised campaign structure
- Operationalising party structure; setting roles and responsibilities, building coherent structure for effective internal and external communications and establishing operating processes that will enable electoral success
- Recruitment of required human resources
- Provision of training and programmes for building capacity

Estimated Cost

\$339,610

### Communications Support

- As a separate component of the capacity building workstream, SCL will provide the TNA/Jubilee with a team of experienced communications consultants who will augment the party's communications capacity whilst also building its internal capacity.

Estimated Cost

\$55,000 (per month)

## COMPONENT 3:

### MEMBERSHIP CARD PROGRAMME AND ASSOCIATED

The defining characteristic of advanced political campaigning in Europe and North America is the use of data analysis and supporter tracking strategies, and these are valuable tools in when executing communications campaigns and mobilising supporters.

SCL proposes to supply the TNA/Jubilee with a membership card programme and associated database infrastructure, which will be one of the first such systems of its kind in the African continent.

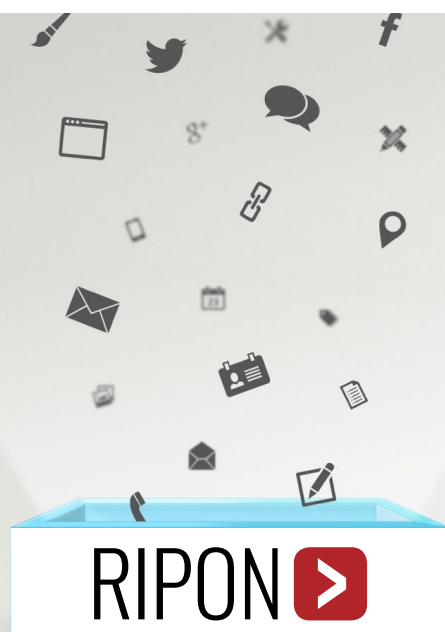
The card system itself will consist of physical cards individualised for registered party supporters, and these enable tracking of supporters' interactions with the party. When a supporter attends a rally or participates in canvassing, for example, their card could be scanned to record their participation in the activity.

Supporters could be incentivised to participate in more activities by a reward structure that records the points attached to their individual file in the database, and SCL's RIPON system (see page 26) can be used to search for supporters based on criteria such as their level of engagement, geographic location and other factors. RIPON can also contact supporters via registered email addresses or mobile phone numbers, or via a mobile phone app.



## ORGANISE

The Nerve  
Centre of Your  
Campaign



DATA COLLECTION & ANALYSIS PLATFORM

## MEMBERSHIP CARDS AND DATABASE SYSTEM

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**OBJECTIVE:** To provide the TNA/Jubilee with the means to track its supporters, engage them with party initiatives and contact them easily when required

- Design and rollout of a party membership card scheme, as well as a database to hold details of supporters and track their interactions with the party
- Provision of training in the use of RIPON and strategies for using data to mobilise supporters

Estimated Cost

\$ 1,199,000

## Interact: Gamification Brings Supporters Back





# ADDITIONAL PROPOSED SERVICES

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## TRACKING POLLS

Once a strategic communications plan has been formulated based on the results of our research programme, SCL can design and implement a programme of tracking polls to test messaging and refine communications strategy on an ongoing basis throughout the campaigning period.

These tracking polls would take the form of a small quantitative survey to track the relative salience of issues and public awareness of the campaign, amongst other issues, as well as a small number of qualitative focus groups that will offer feedback on messaging to enable the TNA/Jubilee campaign to be responsive, agile and constantly fresh throughout the buildup to the 2017 elections.

## CAMPAIGN MANAGEMENT

The sentiment survey results will inform the design of several comprehensive strategic communications strategies, which will be presented alongside the survey results. SCL can provide further support in the execution of these campaigns, however, across a variety of areas.

SCL's campaign management and support staff will tailor a bespoke package of support based on the areas where they would add greatest value, and this could include areas such as events management, fundraising support, the planning and execution of candidate roadshows for direct voter contact, local supporter canvassing, and voter mobilisation on election day.

## DIGITAL COMMS

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## INTERNATIONAL PUBLIC AND PRESS RELATIONS

In an increasingly globalised world, it is more important than ever that governments and political organisations are able to influence international perception of their performance. This is particularly the case when considering a regional power such as Kenya, which has been subjected to significant international scrutiny and criticism in recent years.

SCL can provide specialists in international communications and PR, who will support the work of the TNA/Jubilee and Kenyan government communications officers as they address criticisms levelled at Kenya by international observers and address the unbalanced reporting that has sometimes characterised coverage of Kenya by the international media.

The objectives of this support would be to address the reputational issues facing Kenya internationally, and also to strengthen the capacity of the TNA/Jubilee and the Kenyan government to effectively engage with international media in the future.

# APPENDIX A CORE PROJECT TEAM

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## Alexander Nix - Managing Director

Alexander Nix was educated at Eton College and Manchester University. Over the past 9 years Alexander has worked on more than 40 communication and research projects in the US, Caribbean, South America, Europe, Africa and Asia. He began his career as a financial analyst with Baring Securities in Mexico, thereafter moving to Argentina where he was co-founding partner of a telephony outsourcing business.

In 2001 he returned to the UK to work for Robert Fraser & Partners LLP and then Robert Fraser Corporate Finance where, as an Assistant Director, he worked as principal and in an advisory capacity on UK M&A and transaction work. In 2003 Alexander left finance to join the SCL Group as a Director. In 2007 he directed his efforts to developing the social and governance divisions, including opening new offices in Washington DC and Delhi and growing the global staff to over 300 employees.

## Sabhita Raju - Director of Operations

Sabhita holds an Mphil in Sociology and Politics from Cambridge University and a BA Hons degree in International Relations from Keele University. She has an extensive professional record, having worked in various locations throughout Africa, Asia, the Caribbean and the Pacific over the course of her career. Prior to joining SCL, Sabhita was the Humanitarian Affairs Advisor for Medecins Sans Frontieres (Spain) for East Africa and the Horn of Africa, focusing on negotiations with assertive states, and previously lead a multi-million dollar governance programme for Somalia with the International Peace Building Alliance.

Before this she spent thirteen years at the Commonwealth Secretariat, rising to lead the Secretary-General's Good Offices programme, and was responsible for developing and coordinating the implementation of conflict negotiations in a number of Commonwealth countries. As Director of Operations at SCL, Sabhita is charged with managing large-scale projects and the co-ordination of various geographically disparate teams.

## Kieran Ward - Senior Communications Director

Kieran started his career as a graphic designer at some of the most prestigious agencies in the UK including McCann Erickson, Publicis, Leagas Delaney and DHM, where he was Head of Design and Production. He is skilled and experienced in all areas of graphic design, from designing websites to printed brochures, brand identities to advertising campaigns. He has worked as head designer on global and award-winning campaigns for luxury phone brand Vertu, Whisky brand The Macallan and the Economist.

Since joining SCL, Kieran has matched his skills in developing creative strategies for many successful elections with logistical oversight of research projects across Africa, the Caribbean, Latin America, Eastern Europe and the Middle East. He is passionate about marrying creativity, project management and technical understanding to deliver outstanding results.

# APPENDIX A CORE PROJECT TEAM

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## Dr. Zsolt Kiss - Research Director

Zsolt is a political psychologist and an expert in social research. He specialises in the psychology of communication and has carried out extensive research on the induction of emotions and the effects of emotional appeals in community-based campaigns.

Zsolt is an expert in quantitative and qualitative research methodology, having managed numerous research projects. He was conferred a PhD in Politics from the University of Oxford where he was also employed as a researcher. He also holds MA degrees in Research Design and Data Analysis in Social Sciences. Prior to his work with SCL, he held positions with TNS, Bain & Co. and the UK's National Centre for Social Research. He has also acted as communications manager and consultant for several campaigns in Eastern Europe.

## Dr. Alexander Tayler - Chief Data Scientist

Alexander Tayler is a Chief Data Scientist at SCL Elections. His primary focus is the development and implementation of models that combine theoretical psychology with big data analytics to enable highly accurate predictions of human behaviour. He is also responsible for the validation of these models and visualisation of model results. He holds a Ph.D. from Trinity College, Cambridge, and a BE from the University of Newcastle, Australia. He has significant experience in the commodities sector, having previously worked for both Schlumberger and Orica Mining Services.

## Sam Patten – Senior Political Campaign Strategist

Sam Patten is a senior-level communications, public affairs and political professional who has managed, directed and spearheaded projects that instigate change in nearly a dozen countries around the world. Patten's international work most recently included the 2014 parliamentary elections in Iraq, where he counseled the largely Sunni party of a deputy prime minister. Previously, he played a critical role in the 2012 election of the opposition to government in the former Soviet Republic of Georgia.

In U.S. political and governmental roles, Patten has worked to elect candidates and to serve those advocating moderate, common sense solutions. Patten was appointed by former President George W. Bush to serve as an advisor at the State Department in 2008, and served two senators from Maine as a speechwriter and legislative aide. By combining best practices from the United States with those from emerging countries across the globe, Patten offers his clients a seasoned, balanced and creative perspective for identifying options and tackling the challenges of the moment.

# APPENDIX A CORE PROJECT TEAM

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## Ceris Bailes - Director of Projects

Ceris is a hugely experienced project manager with a range of skills encompassing project design, project management, stakeholder coordination, impact monitoring and operational delivery.

Formerly a commissioned officer in the Royal Air Force and diplomat with the UK's Foreign and Commonwealth Office, Ceris also possesses extensive expertise in delivering high quality projects in Sub-Saharan Africa. Immediately prior to joining SCL, Ceris spent over six years in the international development sector managing programmes in the Democratic Republic of Congo, Sudan and Mali before moving into a more senior role with strategic oversight at headquarters in New York. Having joined SCL in 2013, Ceris is overall responsible for the successful design and implementation of SCL's projects outside of United States of America.

## Marcus Beltran - Director of Programmes

Having spent his childhood in a number of different countries, Marcus has lived and worked in over a dozen international locations with intergovernmental and governmental organisations, NGOs, commercial bodies, academic institutions and media outlets. Having started his career in academia, he thereafter worked in the arenas of health and social policy for the UK government before joining the private sector to work as a public affairs consultant for governments, corporations and NGOs.

His career to date has included two years spent as a country analyst before becoming a Political Affairs Adviser to the UK Commonwealth Secretary General. In this role, he advised senior management on their responses to ongoing issues and crisis situations. His role with the Commonwealth encompassed the design and delivery of technical assistance and capacity building programmes, in addition to leading a number of election monitoring missions.

## Jack Gillett - Chief Data Scientist

Jack Gillett is co-chief Data Scientist at SCL, jointly responsible for our analytics platform, delivering insight to clients from large commercial, found, and unstructured datasets.

Before working at SCL, Jack spent several years as a manager at the Royal Bank of Scotland, managing projects involving pricing exotic derivatives and calculating pricing implications of default risk from the bank's counter-parties. Jack has a PhD in Low Temperature Physics from Trinity College, Cambridge where he also read Natural Sciences at undergraduate.



# APPENDIX A CORE PROJECT TEAM

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## Jon Hassain - Senior Project Manager

Jon taught physics in the UK and Qatar before attending the Royal Military Academy Sandhurst in 2007. After being commissioned into the Corps of Royal Engineers he went on to project manage several military construction projects in Germany and Iraq - most notably the construction of a training facility for the Iraqi Police Academy.

In 2010 he became the Operations Officer for a bomb disposal squadron that supported the UK's domestic security services, providing specialist military capabilities to the 2012 Olympic Games. He was also involved in the implementation of a major co-operation project in Kenya over the course of 2013. Jon's final military posting in 2013 was as the Operations Officer for the Explosive Ordnance Task Force in Helmand, Afghanistan. His roles at SCL have included Operations Manager in one of West Africa's largest health surveys and Political Campaigns Manager on a number of projects.

## Brendan Mitchell - Senior Digital Communications Manager

Brendan is a highly knowledgeable digital media consultant, having spent 2 decades in the digital media & live events industries, during this time he founded & built several companies, the first in Singapore in 1995, with the digital media agency Vision360 being one of the most recent, which he grew impressively before it was acquired for over a £1m by the Cordovan Group in 2007.

He stepped down as a Director of Cordovan Digital in March 2009 to pursue new ventures. Specialising in B2B & B2C communications, social media, mobile apps, information architecture, UX & UI, digital branding & alignment, plus motion picture graphics (Golden Eye, Tomorrow Never Dies, Da Vinci Code, United 93), he continually monitors market trends and new technologies, assessing their potential implications and business benefits.

## Timothy Glister – Senior Creative Copywriter

Tim Glister is a senior creative with several years' experience working across international branding and communications strategies.

After five years in the publishing industry working with bestselling and prize-winning authors he moved into copywriting, specializing in emerging technologies, audience profiling and data-driven engagement. He has worked for VisualDNA, NPTV, Diageo and the BBC, and has won Cannes Lions and Epica Awards.

With SCL Tim has worked on political and corporate campaigns around the world, turning data and research insights into strategic communications strategies that deliver results.

## APPENDIX B CASE STUDIES

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### Ghana, 2013-2014

SCL is currently in the process of completing the final stages of a major project in Ghana centered around the collection, analysis and visualization of social, demographic, economic and public health data.

This project involved one of the largest quantitative and qualitative surveys ever undertaken in West Africa, and over 40,000 individuals were interviewed across Ghana's regions regarding their attitudes on government-provided healthcare and other issues. The data collected was analysed by SCL and BDI data scientists to create a bespoke interactive database listing individuals across the country and their views on the government's performance. A key part of this database is its visualisation capacity, which will allow Ministers and government staff to view and interact with the data in an innovative, dynamic format using maps, graphics and other visual media.

The visualisation database and dashboard will feature community and individual level information across the ten regions of Ghana. The visualisation platform combines this data in a flexible fashion that can be augmented over time as further information becomes available. Ultimately the purpose of the project has been to provide a system via which Ghanaian officials can examine data relating to the population from the micro to the macro level, and on this basis improve policy planning and implementation.

### Trinidad & Tobago, 2010-2014

With a decade of economic growth beginning to falter and a crime rate deteriorating each year, Trinidad & Tobago faced a crucial election in 2010. In this context SCL was contracted by a major political party to develop a suite of messaging tools for its electoral campaign. Deploying to the field several months prior to the election, SCL began a systematic capacity-building effort that improved the party's ability to effectively fight its campaign.

The early assistance of SCL allowed the party leadership to implement a number of new organisational strategies in time for them to become institutionally embedded and thus impact the electoral outcome. In combination with the messaging advice and content provided by SCL consultants based both in Trinidad and the UK, the client managed to retain a significant number of seats in the general election, and indeed in some more closely fought constituencies they were successful in taking seats from the opposition.

SCL expanded upon its work in Trinidad & Tobago with the construction of a bespoke voter database in the period following the election. Utilising a mixture of proprietary and public resources SCL created a flexible and evolving system; one that will act as a focal point for client engagement and messaging efforts over the coming years. In essence this was a natural progression from the 2010 ballot, wherein the client's data infrastructure and analytical abilities were still emergent. For Trinidad's upcoming election in 2015, a systematic and unparalleled set of records will be available to the party describing in detail the demographic, economic and social make up of the electorate. When combined with psychological analysis, it is envisaged that these records will provide a significant advantage in the execution of the communications strategy devised by SCL.

## APPENDIX B CASE STUDIES

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### USA, 2014

In 2014, SCL undertook a massive operation in support of candidates and advocacy campaigns in several US states during the election season. Using our proprietary 'big data' behavioural analytics and extensive political campaign experience, SCL provided data on target voters, messaging and creative solutions to candidates and campaigns, and local staff used our RIPON platform to contact several million voters.

SCL also used its digital microtargeting capacity to support online advertising campaigns by several advocacy campaigns supporting candidates and/or issues, which collectively reached millions of American voters via targeted TV and online advertising that was tailored to their specific political and psychological profiles.

When election day came on the 4th of November, candidates supported by SCL were successful taking seats across the country, and SCL was credited with providing the impetus for victories at both state and federal levels.

### USA, 2015

Following the success of SCL's support for Congressional candidates in 2014, several candidates seeking the Republican Party's presidential nomination approached SCL regarding the possibility of employing its behavioural data analysis and strategic communications for their campaigns.

SCL was retained by the campaign of Senator Ted Cruz to provide data analytics and communications support, as well as a programme of comprehensive online digital communications and donation solicitation. Over several months, SCL's team of data scientists created a database of over 160 million voters that included over 5,000 distinct data points on each individual. This database was used to create a mathematical model capable of predicting an individual's likelihood of donating to the campaign, and in March 2015 SCL managed all aspects of digital fundraising for Senator Ted Cruz's presidential campaign launch. Prior to the full campaign launch, Cruz's campaign management team set a target of \$1,000,000 for first week donations, and SCL's unique donor model exceeded the donation target in the first 24 hours of campaigning. With SCL's assistance, the Cruz campaign raised over 4 million dollars by the end of its first week.

SCL continue to play an active part in the Cruz campaign by monitoring unique website visitors and using targeted messaging concepts to convert these individuals from page visitors into donors, and have provided strategic guidance on the composition of messages directed at potential supporters.

## APPENDIX C REFERENCES

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### Rojo Mettle Nunoo

Former Deputy Minister of Health, Republic of Ghana

"SCL was engaged in Ghana to undertake an extensive nationwide research-led public health project. The target audience analysis generated by the project led to a series of policy adjustments and recommendations for behavioural change, helping us to identify both key negative health behaviours and also behavioural triggers to be used in future health communication.

The SCL Social team, headed by Ceris Bailes, delivered a high quality product that was adapted to the specific cultural context of Ghana. The research undertaken not only responded to our needs, but also highlighted a number of other issues that were not initially within the scope of the project."

### Dr Arthur B Robinson

Chairman, Oregon Republican Party

"SCL Elections did work of exceptionally high quality in Oregon in 2014.

The ability, experience, and work ethic of every individual SCL professional who worked in Oregon was extraordinary and surpassed that of all other professionals that I have had the privilege of working with. Also, all of these SCL individuals of excellence worked seamlessly together as a very effective team. We were very fortunate that they chose to work in Oregon. The truth is that the SCL team that I worked with was so terrific that they made all of their peers here look like amateurs."

### Herman Cain

Republican Presidential candidate 2012

"As a former candidate for President of the United States in the 2012 election cycle, I can emphatically state that Republican candidates will continue to be at a disadvantage until the full capabilities of 'behavioural modeling and big data' are an integral part of a winning campaign strategy. I also believe we may have been able to win the past election had we been properly implementing the processes used by our opposition in these areas.

I have been briefed on the SCL Group's deliverables for the 2014 election cycle, with full implementation for 2016 and beyond. It is my firm opinion that if not implemented, we risk never being competitive and will forever lose the opportunity to win on a broad scale or to even compete on an even playing field."





# APPENDIX D SURVEY METHODOLOGY

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As outlined in the preceding sections, SCL will undertake a comprehensive programme of behavioural research that will generate insight and county-level recommendations regarding public perception of the security situation and the efficacy of the government's response, perceptions of the efficacy of government policies on health, energy and education, and other information regarding social networks and channels of mass communication.

## **Phase 1 – Review of Existing Sources & Conceptual Design**

The first phase will be Desk-Based Research in the UK and Kenya, which will involve reviewing available secondary sources and carrying out consultations with subject matter experts. This will enable SCL to identify available demographic and other data (useful when defining sample frames), and will also allow SCL to structure the questionnaire to be deployed during the pilot research phase.

The key outputs from this initial stage will be a body of secondary data that will inform the design of the project, as well as a detailed list of the specific issues that must be investigated over the course of the project's life.

SCL commits to consult on the development of the project timeline and to agreeing milestones to ensure that objectives are met in a timely manner. This will allow the identification of any risk factors threatening timeliness at the earliest possible stage.

## **Phase 2 – Field Research Design**

Following the completion of Phase 1, SCL will begin collaborating with a local Kenyan partner organization to develop detailed itineraries for a county-by-county qualitative and quantitative research programme. Also included in the formulation of this research programme will be any specific requirements suggested by the client, including potential focus on particular ethnic groups, geographic areas or subject matter.

Based on the results of Phase 1 and local knowledge, the London-based Research Team will work concurrently with the BDi to define the parameters of the project and select the most appropriate suite of flexible, multi-method field research methodologies. They will design a research programme that utilises the statistical techniques and psychosocial research parameters likely to provide the greatest insight.

Using these research methodologies, SCL be able to provide a complete picture of public perceptions, as well as recommendations regarding how these can be shifted via strategic communications.

## **Phase 3 – Field Research**

SCL Social will establish in-country branches of expatriate and local researchers, analysts and project managers. Each location will be staffed with a mix of locals and expat managers. The number of staff required to conduct data collection and analysis will depend on the selection of locations, though generally a project of this size requires approximately 8-10 core staff in London in addition to deployed field teams.

# APPENDIX D SURVEY METHODOLOGY

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The research programme will take the form of a large-n quantitative survey, conducted via face-to-face interactions with respondents. SCL will also undertake qualitative data gathering efforts including social network surveys, focus groups and one-to-one in-depth interviews:

- The survey instruments will be piloted by conducting interviews with targeted respondents over 1-3 days, and refined as necessary;
- All survey interviews will be guided. Respondents to any survey instrument will not be the same as those for any in-depth interview;
- Field Research team members will be responsible for their own data entry and will do this on a daily or 2-day basis. The fieldwork supervisor will oversee data entry and ensure that sorting and cleaning protocols exist to maintain the highest possible level of dataset quality;
- Responses will be recorded into an electronic database, allowing for statistical analysis and visual presentation of research conclusions.

Members of each team will share their cultural and socioeconomic background with the target location(s) allocated to them. This will ensure efficiency, relevancy, and security through local knowledge of the research environment.

Researchers will have prior experience of conducting research; however, specific SCL training sessions will be held, as SCL's methodology requires attention to detail to ensure that the data collected is reliable. Research instruments will be translated into the language and dialect most widely understood and accepted by target groups and/or relevant sub-groups. All research will be presented as an academic research study and all researchers will carry identity cards.

SCL will separately recruit and capacitate an independent Quality Check team that will monitor data collection, and ensure that quality assurance procedures are followed.

Each researcher will complete their interviews through a smart phone or tablet application that both uploads the data and marks their location by Global Positioning System (GPS). The use of smart phones and tablets with trackable GPS systems will provide invaluable quality control measures, and also allows research conclusions to be geographically divided.

The overall project will be overseen by the Project Managers – SCL employees from the UK with extensive experience of project management in Sub-Saharan Africa. Project Managers will be responsible and accountable for quality control and adherence to budgetary and other constraints on activities and deliverables.

In addition, BDi scientists will design controlled and randomised experiments to test the effectiveness of sample messages and initiatives amongst the population. The ultimate aim is to test their effectiveness and define a communications strategy for our client.

## Phase 4 - Analysis & Recommendations

Target Audience Analysis (TAA) forms the central element of this phase. By compiling all the data collected and subjecting it to an array of analysis methodologies SCL be able to provide a complete picture of public perceptions, as well as recommendations regarding how these can be shifted via strategic communications.

## Deliverables

The principal deliverable for this project will be a comprehensive research report, made available in electronic version, and prepared in English following the guidelines provided by our client.

A secondary deliverable will be a PowerPoint presentation summarising the main findings of the research, as well as the prescribed communications strategies.

# APPENDIX E INDICATIVE BUDGET

KENYA - TNA/JUBILEE						
Component		Unit Cost	Number of Units	Occurrence	Days In-Country*	Cost
Nationwide Sentiment Survey						
Nationwide Sentiment Survey						
	Senior Responsible Director	\$ 1,461.25	1	5	4 \$	8,506.25
	Project Manager	\$ 1,225.00	4	65	45 \$	332,000.00
	Quantitative Analysis Specialist (inclusive of research design)	\$ 1,312.50	2	45	45 \$	131,625.00
	Survey Cost	\$ 12.00	47,000	1	0 \$	564,000.00
	Desk-based Researcher	\$ 603.75	3	40	0 \$	72,450.00
	Qualitative Analyst (inclusive of research design)	\$ 1,312.50	3	35	0 \$	137,812.50
	Political Messaging Specialist	\$ 1,312.50	1	10	0 \$	13,125.00
	Creative Director	\$ 1,312.50	1	10	0 \$	13,125.00
	Quantitative Analyst	\$ 1,312.50	3	35	0 \$	137,812.50
	Survey Translation Services	\$ 0.53	47,000	2	0 \$	49,350.00
	In-Depth Interviews (including vox pops)**	\$ 87.50	150	1	0 \$	13,125.00
	Focus Groups Discussions**	\$ 1,200.00	50	1	0 \$	60,000.00
	Database License and Architecture	\$ 60,000.00	1	1	0 \$	60,000.00
	Programme Costs*	\$ 3,750.00	18	1	0 \$	67,500.00
	Sub-Total				\$	1,660,431.25
	*Includes subsistence costs including accommodation, food, etc.					
	**Including travel documents, airline fares and insurance					
	**Exact number and geographical determination to be agreed					
Party Organisational Infrastructure						
Party Organisation, Recruiting, Training, Operationalising Party Structure (Campaign HQ would have to be priced separately so not included here)						
	Project Director	\$ 1,461.25	1	2	1 \$	3,222.50
	Project Manager	\$ 1,225.00	1	35	30 \$	51,875.00
	Political Campaign Consultant	\$ 1,312.50	2	35	30 \$	100,875.00
	Organizational Expert (infrastructure, training)	\$ 1,312.50	2	35	30 \$	100,875.00
	HR consultant	\$ 1,312.50	1	35	30 \$	54,937.50
	Project Assistant	\$ 603.75	2	35	30 \$	51,262.50
	Programme Costs*	\$ 3,750.00	6	1	0 \$	22,500.00
	Sub-Total				\$	385,547.50
	*Including travel documents, local airline and other transport costs and insurance					
TNA/ Jubilee Alliance Supporter Database & Party Membership Cards						
Development of Supporter Database, Creating Party Membership ID Cards, Gamification						
	Acquisition of Voter Information (costs will depend on data readily available)					-
	Cost of the server to store the database and support for 20 million voters will depend on whether it is stored at SCL (at a \$5,000 a month) or at the Client's server*				\$	30,000.00
	Project Director (Strategist)	\$ 1,461.25	1	10	3 \$	15,512.50
	Project Manager	\$ 1,225.00	1	10	5 \$	13,750.00
	Data Scientist (creating TNA / Jubilee Alliance membership database architecture)	\$ 822.50	1	25	10 \$	23,562.50
	Data Analyst	\$ 1,312.50	1	25	0 \$	32,812.50
	Senior Designer (online interface, card design and functionality, gamification)	\$ 962.50	1	25	0 \$	24,062.50
	Designer	\$ 875.00	1	15	0 \$	13,125.00
	TNA/ Jubilee Alliance Supporter Database Infrastructure design	\$ 30,000.00	1	1	0 \$	30,000.00
	Card Printing Machines	\$ 4,800.00	45	1	0 \$	216,000.00
	Producing cards (will depend on number of members, card quality & will have to be priced separately)	\$ 0.80	1,000,000	1	0 \$	800,000.00
	Sub-Total				\$	1,198,825.00
	* Covers first 6 months cloud cluster hosting costs. Thereafter cost to be borne by client					
Programme Support & Logistics						
Office Establishment and Local Logistical Costs						
	Office Space, Supplies, AV & Telecommunications, and Logistics	\$ 600.00	1	1	120 \$	36,600.00
	Local Printing	\$ 6,125.00	1	1	1 \$	6,125.00
	Sub-Total				\$	42,725.00

**Total** \$ **3,287,528.75**

## APPENDIX F INDICATIVE TIMELINE

WORKSTREAM	Aug 15	Sep 15	Oct 15	Nov 15	Dec 15	Jan 16	Feb 16	Mar 16	Apr 16	May 16	Jun 16	Jul 16	Aug 16	Sep 16	Oct 16	Nov 16	Dec 16	Jan 17	Feb 17	Mar 17	Apr 17	May 17	Jun 17	Jul 17	Aug-17 Election
<b>National Survey</b>																									
Research Design																									
Data Collection																									
Data Analysis																									
Strategic Plan Preparation																									
<b>Capacity Building</b>																									
Party Capacity Audit																									
Capacity Building Plan Design																									
Capacity Building Plan Implementation																									
Communications Support																									
<b>Membership Card Programme</b>																									
Card System Setup																									
Party ID Card Delivery																									
Party ID Card Pre-Registration Period																									
Ongoing Registration																									
Card Distribution																									
<b>Additional Services</b>																									
Int. Press & PR																									
Tracking Polls																									
Message Testing																									
<b>Campaign Management</b>																									
Communications Campaign 1																									
Communications Campaign 2																									
Communications Campaign 3																									
Communications Campaign 4																									
Voter Mobilisation - GOTV																									

## APPENDIX E RIPON

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# RIPON

## ONE INTEGRATED CAMPAIGN TOOL



### RIPON: THE FUTURE OF CAMPAIGNING >

An innovative voter engagement and campaign management tool for your team to control all aspects of the modern campaign space. Our multi-platform software provides a unified solution that allows clients to position and manage their candidates, advocacy campaigns, volunteers or party membership more efficiently and more effectively.

With in-depth voter/supporter data and community profiles available at the touch of a screen, powerful voter or volunteer/party member engagement and fund raising strategies can be executed with complete synergy. A revolutionary, easy to use and interactive product, Ripon allows for targeted supporter mobilisation combined with real-time oversight from Campaign HQs. This tool can be customised to manage the specific information and supporter information required by TNA/Jubilee for both party organisational needs, or electoral campaign implementation.

The Ripon tool is optimized to work across all platforms from PCs and Laptops, to tablets and smart phones. Its constant multi-platform connectivity ensures that managers always have access to core system features such as: Get Out The Vote, Behavioral Microtargeting™, Bulk SMS and Canvassing. Ripon's suite of features also permits managers to control other campaign activities such as artwork, query building and scheduling, meaning that whether a key element or minor component, every aspect of the campaign can be optimised and perfected.



## STRATEGY FEATURES



**ENHANCED VOTERFILE:** Electoral Roll for your region that has been rigorously cleaned, updated, and enhanced with additional contact and political data.



**PSYCHOGRAPHIC PROFILING AND DIAGNOSTICS:** Delve well beyond standard political messaging to understand the underlying psychological motivators of voting for each target segment.



**BEHAVIORAL MICROTARGETING™ | VOTERFILE SCORES:** Accurate behavioral and political scores for every single voter based on advanced statistical modeling techniques.



**PRETESTED MESSAGING:** Preloaded arsenal of highly refined and scientifically tested messaging content optimized for each target voter category.



**APPLIED INTERVENTION STRATEGIES:** Easy to understand documentation on voter behavior research with clear and actionable recommendations on how best to engage with different types of voters.



**CAMPAIGN ARTWORK:** Use pretested artwork designed for each voter segment so that every campaign communication uses high-impact visuals with ad agency quality.



**ONBOARDING NEW CAMPAIGNS:** Help campaigns embed the engagement tool into their campaign and help complete data mapping for their tags and groups to meet individual campaign needs.



**CAMPAIGN DATA IMPORT:** Work with campaigns to help gather existing data, normalize it, and import it into their new system.

## MANAGEMENT FEATURES



**TURF CUTTING / CANVASSING:** Narrow down your targeted lists to specific neighborhoods, walkroutes, and streets for optimal canvassing. Add instructions for canvassers and print paper walkroutes and lists, or send to the SCL canvassing app.



**ONLINE MARKETING/ADS:** Create and optimize online advertising through banners, Google, Facebook, apps, and other websites.



**MESSAGE MANAGEMENT AND WORKFLOW:** Have suggested messages arrive at the campaign office for approval and sending after a central campaign review process.



**SCHEDULING:** Campaign scheduling tool with shared calendar and calendar/email integrations with formatted messages.



**MANAGE MY TEAM:** View your campaign team with a full hierarchy. See team and individual performance, adjust volunteer and user permissions, send e-mails and SMS (text) messages to volunteers, and see full metrics on their performance.



**GAMIFICATION:** Built in reward structures designed to create a meritocratic campaign and encourage volunteers to go the extra mile.



**QUERY BUILDER:** Build and run custom queries and searches. Save them for later or share with others.



**GROUPS AND TAGS:** Build static and dynamic lists to assign or tag electors; or for use in canvassing, emailing and phone banking.

## ENGAGEMENT FEATURES

*Features require additional tailoring to fit individual campaigns*



**PHONE BANKING:** Create and schedule volunteer phone banks, choose phone bank volunteers, and assign target groups/locations.



**AUTOMATED CALLING:** Create automated phone calls with interactive voice response technology to allow for mass telephone messaging and surveys.



**DIRECT MAIL:** Create bulk mailings and prepare them for printing locally in office, through a local provider or through a trusted national bulk mail partner.



**BULK E-MAIL:** Create individual or bulk email based on targeted groups. Send email through trusted national partners for optimal penetration and worry-free sending.



**BULK SMS (TEXTING):** Send single or mass SMS messages to target individual voters or groups of voters.



**GET OUT THE VOTE:** GOTV live performance metrics, real-time analytics, and visualization. Create campaign bus pickup lists, schedule reminder phone calls, mark off voters that have voted, and message through email, SMS, and social media.



**SOCIAL BLASTS:** Connect to Facebook, Twitter, and LinkedIn to post campaign messages through supporters and volunteers.

*Thank you for taking the time to read this paper.*

*SCL would be pleased to meet to discuss further how the practices outlined in this document can be implemented.*

*Yours sincerely,*

A handwritten signature in black ink, appearing to be 'Alexander Nix', with a long horizontal flourish extending to the right.

Alexander Nix

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