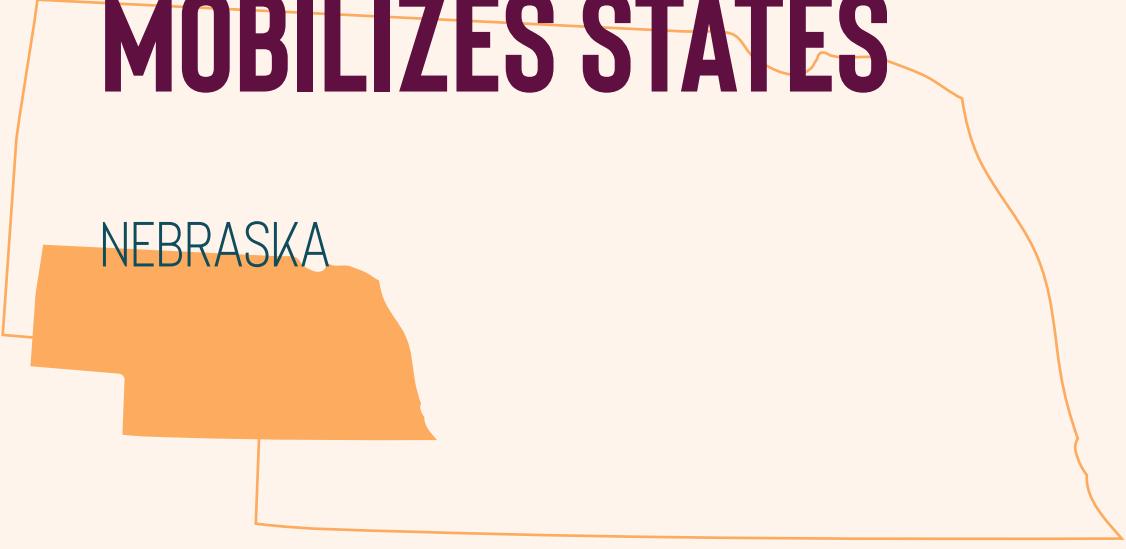


# MEDICAID EXPANSION MOBILIZES STATES



NEBRASKA

In 2018, a ballot initiative, Initiative 427, was brought to Nebraska voters to expand Medicaid. Nebraska's "Medicaid Expansion Initiative" passed with 53.55% of the vote [45]. Though the rollout has been fraught with delays and challenges, the law now requires the state to provide Medicaid to individuals under the age of 65 whose income is equal to or less than 138% of the federal poverty line. The case study in Nebraska offers important insights into building power around what is typically considered a progressive issue in a red state. This case also illuminates the challenges as well as the importance of tailored strategies when campaigning in rural versus urban areas.

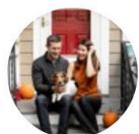
# **THE LONG HAUL:**

## **Ballot Initiatives Give Voice to Voters**

### **When Legislators Won't**

For years, advocates and moderate conservative lawmakers tried unsuccessfully to pass bills to expand Medicaid in Nebraska through their nonpartisan unicameral state legislature. Senator Campbell and Senator McCollister worked hard in those first four years to try and build a coalition of lawmakers that could get the bill through the legislature. As Molly McCleery, the Director of the Health Care Access Program for Nebraska Appleseed, recalled, a Medicaid expansion bill was first brought to the Nebraska legislature in 2013. The bill was reintroduced yearly with the backing of her organization and received, according to McCleery, "progressively less attention and less support." Each time, these bills died in committee or on the floor.

**A turning point for Nebraska came on the heels of Maine's success in passing Medicaid expansion by ballot initiative in 2017.** Much like Nebraska, Maine had a governor who was hostile to Medicaid expansion, which had a chilling effect on what was politically feasible through the state legislature, and which made the voters' will more impactful. Upon learning of the win in Maine on election night 2017, Nebraska State Senator Adam Morfeld tweeted, "I will introduce a proposed Medicaid Expansion ballot initiative in the Nebraska Legislature in 2018. It's time to let the people decide." From there, Senator Morfeld reached out to those who had worked on the issue in Maine and began collaborating with national, Washington D.C.-based organizations, such as the Fairness Project and Families USA, and local organizations, which had long worked on this issue, most notably Nebraska Appleseed.



**Senator Adam Morfeld** @Adam\_Morfeld · Nov 7, 2017

**I will introduce a proposed Medicaid Expansion ballot initiative in the Nebraska Legislature in 2018. It's time to let the people decide.**

...



**The New York Times** @nytimes · Nov 7, 2017

Maine voters approved an expansion of Medicaid in direct defiance of Gov. Paul LePage  
[nyti.ms/2zoLau9](http://nyti.ms/2zoLau9)

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21



187



643



**This approach, turning to voters when elected officials are out of step with the desires of their constituents (as measured by the polling prior to the campaign and the success of the ballot initiative), was an important driver of the use of ballot initiatives, measure, and amendments not just in Nebraska but in other cases in this study.**

MOLLY MCCLEERY

# BUILDING POWER THROUGH KEY ORGANIZATIONS: Appleseed's Leadership & Nonprofit Strategy

The success of Initiative 427 was driven, in large part, by the groundwork and leadership of Nebraska Appleseed, an advocacy organization whose mission is to “fight for justice and opportunity for all Nebraskans” taking a systemic approach to their work. **In every interview we conducted with individuals who contributed to the Medicaid Expansion efforts in Nebraska, the significant role of this organization in the ballot initiative’s success was highlighted.** Nebraska Appleseed was established in 1996 as a social change legal organization and has more recently added proactive policy advocacy to its repertoire. Appleseed’s early work on Medicaid expansion focused on litigating Medicaid eligibility; as their approach incorporated more policy work, they shifted to engage in policy advocacy around closing gaps in healthcare coverage.

**The winning strategy rested on a strong coalition of advocacy organizations and small direct service nonprofits, which engaged their client bases and communities.** The coalition also included faith-based organizations, like Omaha Together One Community, a membership-based community organizing nonprofit made up of local Christian congregations, as well as state affiliates of national nonprofits such as Planned Parenthood. **In addition to door knocking and sending postcards, the strategy centered on meeting people where they were—physically, at farmers’ markets and other community gathering places, and politically, by framing the issue in ways that spoke to people’s everyday experiences.** Nebraska Appleseed, for example, ran educational and storytelling trainings for coalition partners and also collected people’s individual stories to understand their healthcare troubles and needs. Kinzie Mabon, Field Director of the Nebraska Civic Engagement Table, expressed:

*I want to praise Appleseed a million times over. Because it took a while for the campaign to actually get moving—the campaign itself, not the effort. Appleseed really took on the brunt of that work.*

She noted Appleseed’s instrumental role in delegating and training coalition partners early on.

Two individuals emerged as activists through the ecosystem undergirding the fight for Medicaid expansion: Amanda Gershon and Kinzie Mabon. Ms. Gershon was a co-sponsor as well as the face of Initiative 427. Her personal story translated the federal policy into a relatable need for health care coverage for Nebraskans. Gershon shared that prior to getting involved in Medicaid expansion she did not consider herself an activist, and explained the seemingly mundane impetus for her activism: “I was frustrated and wrote a letter to the editor of my local newspaper, and they asked me if I was interested in going to the legislative hearing and reading it. And so I did.” Her personal story highlighted the harm facing individuals who fell into the health care gap.

*I was really sick. I needed health care. At one point, I was working two jobs to pay for prescriptions, and I really needed a lot of testing and surgeries to get better. But by that point, I was only working part-time so I didn’t qualify for Medicaid expansion, and I didn’t qualify for subsidies because my income was so low. I was angry because I thought the ACA would save my life. I thought once that went through, everything was going to be okay. But then finding out my state opted out really frustrated me.*

As summed up by Becky Gould, Executive Director of Nebraska Appleseed:

*Amanda, who was one of the Ballot Committee members, was a key partner. She was out collecting signatures too. She continued to talk with other individuals around advocacy, and sharing your stories, and she did press work, and really was a key person in the whole effort.*

Kinzie Mabon, the Field Director at the Nebraska Civic Engagement Table, was another important individual whose organizing expertise was honed through her work on Medicaid expansion. Mabon originally came to organizing work through her passion for helping people with felonies on their record register to vote and “participate in the system.” Mabon quickly rose up the ladder at the Nebraska Civic Engagement Table, and is responsible for moving their members up the engagement ladder and building the capacity of organizers. For Initiative 427, Mabon held the big-picture strategy for voter and community engagement, looking at the state map and helping to identify where more support was needed across the state. She also collaborated with Applesseed and helped train and provide information to smaller nonprofits new to civic engagement work. **As Zack Burgin, Executive Director of the Nebraska Civic Engagement Table, put it, the Medicaid expansion team wanted to**

**develop a new model for organizing, breaking away from political establishment strategies which rely heavily on “consultant culture,” and Mabon was a key player in this new model.** He noted, “they talked to Kinzie about writing up their very first field plan, developing that for the roll out, for the volunteer collection piece, and then who we were going to mobilize.” **As a Black woman, Mabon was also clear to note the important role of BIPOC-led and BIPOC-focused organizations in this effort. She explained that Nebraska is often seen as a homogenous state, but that many counties have growing immigrant and refugee populations, in addition to the existing African American populations in urban centers.** Her organizing leadership guaranteed that these groups were not forgotten in the efforts to expand Medicaid.

**The winning strategy rested on a strong coalition of advocacy organizations and small direct service nonprofits, which engaged their client bases and communities.**

# Strategies for Urban and Rural Counties

The qualification process for getting a ballot initiative onto the ballot in Nebraska requires obtaining a minimum number of signatures proportional to the population in each of the state's 93 counties. As such, **a strategy attuned to the unique concerns and challenges of urban versus rural populations was central to signature collection for qualification, and later for the campaign.** In addition to the different lifestyle considerations that are key to organizing, the urban rural divide also reflects a political divide. As described by Senator Morfeld, "only a third of Nebraskans are registered Democrats... it's a tale of urban versus rural in many cases." This staunch political divide persists, despite the fact that Medicaid expansion stood to benefit rural areas more than urban centers.

The organizing strategies employed in Lincoln and Omaha did not differ greatly from those used in mid-sized cities in other states we analyzed. One notable way in which urban and rural populations were engaged was through power-building using a racial justice lens. In particular, the Heartland Workers Center sought to connect the injustices facing Latinx workers in rural meatpacking plants with the issues facing Black people and other people of color in cities. Ryan Morrissey, Senior Organizer at the Heartland Workers Center, emphasized that these communities are united by the impact of "racial injustice and white supremacy" and also that they lack power. He noted, however, that each campaign provided an opportunity to build power in BIPOC communities, which are growing rapidly in Nebraska. He explained how this looks in their organizing model:

*With every Get Out The Vote campaign that we do, increasing the voter turnout is always one of the top goals. But we always have the secondary goals, and I would actually even put them in line with increasing voter turnout, like discovering the issues that affect our communities so that we can go into the next year with the issues that we know is [sic] affecting the community the most. Another huge part of it is finding leaders. If there's someone on the phone with us, and they seem really excited about the work we do, or really excited about the election, we will mark that person as a potential leader. We will do follow-ups with them and get them involved in the Heartland Workers Center work throughout the year. So we definitely have found leaders in past campaigns, including the Medicare expansion, that are still with us today.*

There were some key differences in how voters were engaged in rural areas. For example, Brian Depew, Executive Director for the Center for Rural Affairs, noted:

*Everybody reads their local newspaper in small towns, still, so it's a good way to reach a traditional rural constituency.*

Depew underscored the importance of small, local media outlets for reaching rural voters including daily and weekly newspapers as well as local radio stations.

**Trusted messengers were also key to gaining the interest and trust of rural voters.** In referring to the qualification process, Gould of Appleseed summed it up eloquently: "Grassroots and volunteer signature collection works. People trust them." **Interviewees mentioned librarians, local elected officials, and volunteers as trusted messengers who were able to successfully connect with rural voters.** For example,

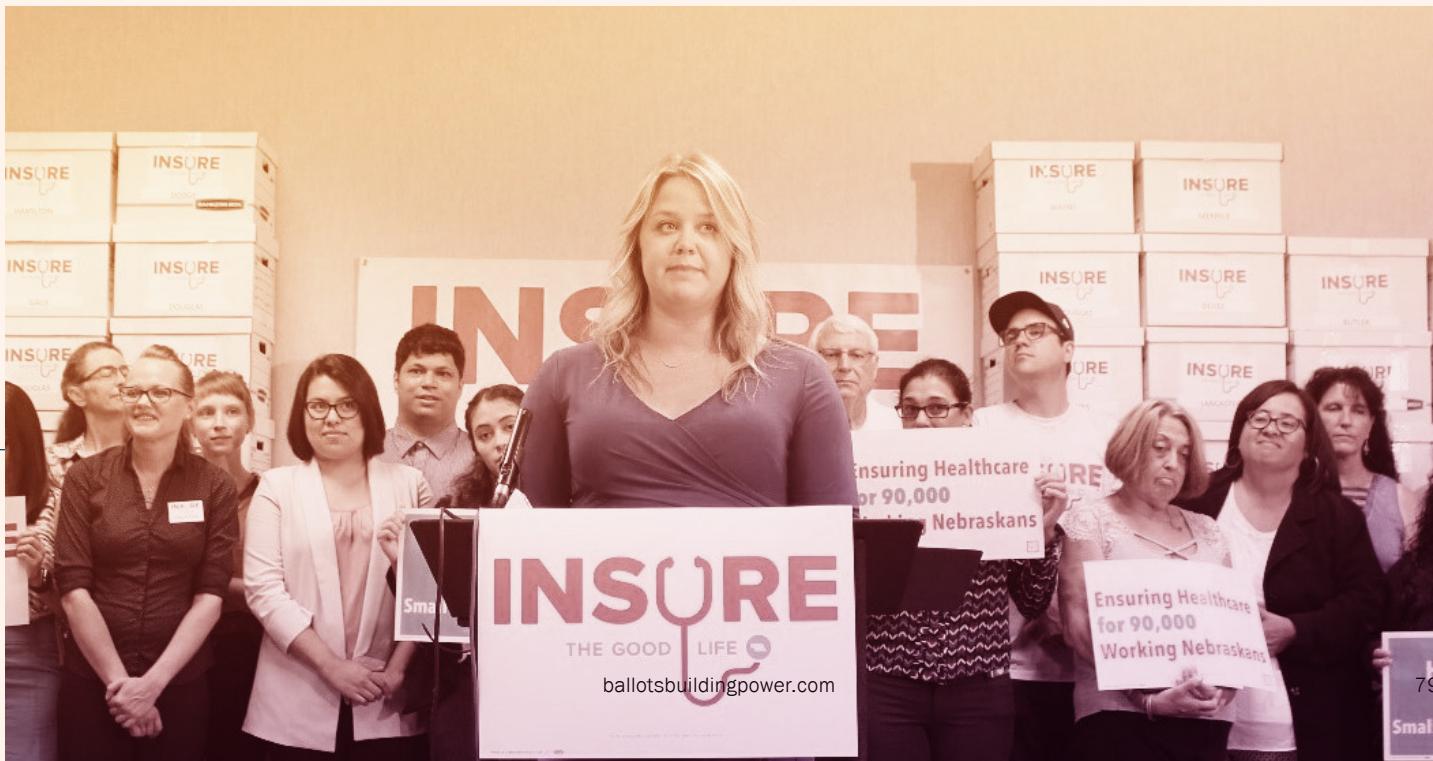
former nursing professor at Creighton University and member of OTOC, Linda Ohri, recounted how her personal networks in Boyd County allowed her to connect with local residents and gather signatures. In particular, her cousin Debbie, who worked as a maintenance person at a local school and was on the County Board, simply “knew everybody.” Dr. Ohri noted that in particular, Debbie knew “people who needed Medicaid expansion.” Connecting the role of trusted messengers with small, local media, Meg Mandy, the campaign manager for Initiative 427, explained:

*What I learned [in a previous campaign] was about identifying respected leaders in those communities, getting them on your side, getting them to submit letters and op-eds to those papers that people were reading... They really trust their local, small town paper.*

Last, the realities of daily life in rural areas may require different approaches to organizing or communications strategies. The Medicaid expansion campaign in Nebraska listened to rural coalition partners in making these key decisions. McCleery reflected on a poignant example:

*We really learned partway through [that] we have to trust what we know to work. And every state is going to be a little bit different. And with that, I think we were able to really help the campaign fill out their staff with local people who had local experience in either working on other initiatives, or local organizers, or who had done local political campaigns, so had some thoughts on like, “Hey, I worked on this campaign before, we did ads just like this. We spent a ton of money on TV ads in this place. Nobody watches TV in western Nebraska at this point because it’s harvest season. Nobody’s in their house.”*

This kind of local knowledge was crucial for tailoring campaign strategies and tactics so that they reached rural residents.



# **KEY MESSAGING & FRAMING: State Motto for a Conservative Electorate**

While the majority of Nebraska's electorate is registered Republicans, Medicaid expansion passed with bipartisan support. Part of its success lies in the framing of the issue. As McCleery explained, “**Our messaging had been tested over the legislative campaigns for so long that we knew what worked and what didn't work.**” The campaign for Initiative 427 was dubbed “**Insure the Good Life Campaign,**” a play on the state’s slogan, “The Good Life.” By tapping into values that resonated with Nebraskans’ identity, the campaign sought to bridge any political divisions on the issue. As Senator Morfeld noted, without “a bipartisan appeal, we never would have won.” Instead, he stressed the focus on messaging around affordability of healthcare. Another important message that was directed particularly to rural populations was the importance of Medicaid for supporting financially struggling rural hospitals. McCleery emphasized that messaging around caring for communities and families was especially resonant with voters across the state.

**By tapping into values around care and quality of life, the campaign was able to appeal to both conservative and progressive voters.**



**By tapping into values that resonated with Nebraskans’ identity, the campaign sought to bridge any political divisions on the issue.**

# CHALLENGES

Even with the success of Initiative 427, there were challenges along the way. This hard-fought win came with heartache and some powerful lessons.

## Racism in Rural Communities

Even with the success of Initiative 427, there were challenges along the way. This hard-fought win came with heartache and some powerful lessons.

Racism in Rural Communities. **Several interviewees reported the racism faced by organizers of color who ventured out from Lincoln or Omaha into rural communities to knock on doors collecting signatures or getting out the vote.** Meg Mikolajczyk, Deputy Director of Legal Counsel at Planned Parenthood, North Central States, explained that as a white woman, she felt open to being sent to rural parts of the state to work on the campaign: “I heard horror stories about anyone of color going outside of Omaha, that it was a nightmare. And I am not surprised.” Becky Gould of Appleseed corroborated this statement. Gould described several examples of “overt racism on the ground” and told the story of a Latinx organizer in a rural town:

He went to one of the doors and the guy said, “You don’t want to be in this neighborhood. I’m just giving you a heads up.” He was not threatening, he was trying to be helpful. But he [said], “There are people with shotguns and you don’t want to experience that.” And that really rattled [the organizer], rightfully.

As Gould reflected back, she noted that while they did provide support for navigating such situations, the campaign and coalition partners should have done more to plan and prepare whom they sent where so as not to endanger BIPOC.

## Paid Outside Consultants

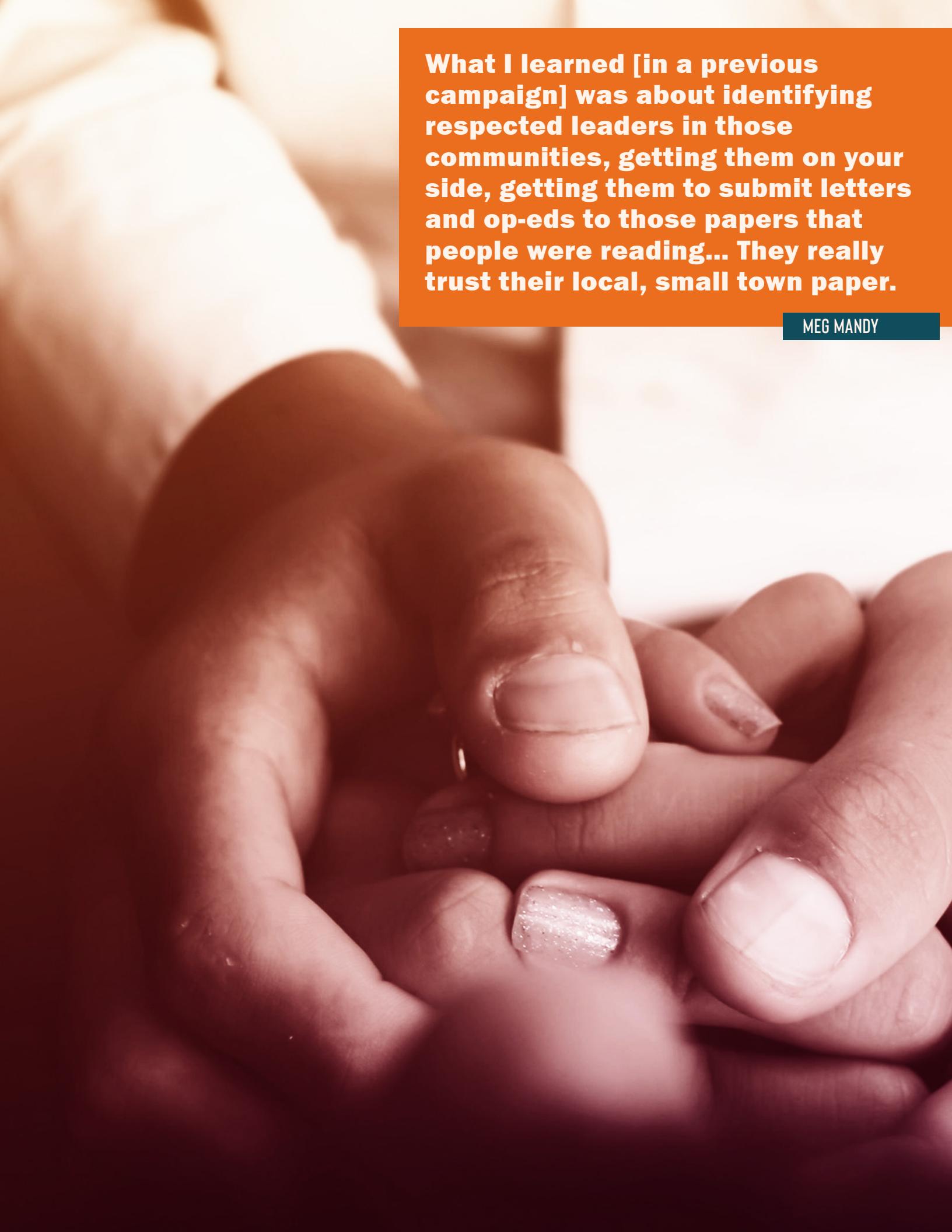
Many interviewees reported negative experiences with paid outside consultants. As one respondent put it, the paid consulting firm that was hired for Initiative 427 represents “the best nightmare.” The main complaints are:

1. The parachute model of participating in campaigns
2. That they are notorious for going over budget
3. That issues or conflict arise between paid canvassers and volunteers

As Gould put it:

*Our takeaway was [to] reduce reliance on paid firms—[They are] super expensive, much more of a mercenary approach. We spent way more time than we wanted to navigating people’s frustrations with the way they were behaving in the community.*

**Instead, organizations are looking to invest in local capacity to build the skills needed to accomplish these goals without the support of paid outside consultants.** To be sure, paid consultants saw their role differently. As Lewis Granofsky, a partner at FieldWorks—the firm hired to support the signature collection for Initiative 427—articulated, **“part of our model was built specifically to work with organizations and groups on the ground and make room for them and coordinate with them instead of competing with them.”**



**What I learned [in a previous campaign] was about identifying respected leaders in those communities, getting them on your side, getting them to submit letters and op-eds to those papers that people were reading... They really trust their local, small town paper.**

MEG MANDY

# MEDICAID EXPANSION MOBILIZES STATES



Medicaid expansion was brought to Montana voters via Ballot Initiative 185 (I-185) in 2018 with the hopes of cementing the policy's future in the state. Montana had previously expanded Medicaid through the legislative process in 2015, but the policy included a sunset clause with an end date of June 30, 2019. Advocates for I-185 hoped to bypass the legislature and a new potential sunset date, by bringing the vote directly to voters with the "Extend Medicaid Expansion and Increase Tobacco Taxes Initiative." As indicated by the ballot initiative's title, Medicaid expansion was paired with a tobacco tax, which would be used in part to fund Medicaid. Unfortunately, the ballot initiative was not successful, receiving only 47.30% of the vote. Had the initiative passed, it would have extended Medicaid expansion with no new sunset date and imposed a tax on tobacco products in order to fund Medicaid expansion programs and other health-related programs. Though Medicaid expansion did not pass as a ballot initiative, it was passed legislatively in 2019 with a new sunset date of 2025 and with new work-related restrictions as well as higher premiums for expansion enrollees.

# Organizational Support for I-185

**With the passage of the Affordable Care Act, and the subsequent Supreme Court decision that states could opt into Medicaid expansion, a coalition formed in 2012 because they knew it “was going to be an uphill battle in Montana”** as stated by SJ Howell. Howell is the Executive Director of Montana Women Vote, an advocacy organization serving low-income women and families across Montana. That coalition successfully expanded Medicaid in their state through the state legislature in 2015, but progressive organizations as well as the Democratic Governor at the time, Steve Bullock, were concerned about the prospects of Medicaid expansion’s renewal with the Republican controlled state legislature.

Once it was decided that a ballot initiative would be the best approach, it was paired with a tobacco tax.

**Rich Rasmussen, CEO of the Montana Hospital Association, explained that a tobacco tax was paired with Medicaid expansion to fund the program because I-185 organizational supporters such as the American Heart Association or the Cancer Society were “really anti-tobacco,” and because Montana had not raised taxes on tobacco in years.**

Advocacy organizations supported I-185 in large part because of the health benefits to Montanans. Interviewees representing organizations ranging from the Hospital Association to Western Native Voice expressed the importance of Medicaid expansion to their communities. Beyond the health benefits, some interviewees shared an intersectional and anti-racist analysis for their efforts to pass I-185. Howell, for example, noted that supporting Medicaid expansion was part of Montana Women Vote’s broader health

equity goals, including “**folks who experience barriers to health care, including living in poverty, living in a rural part of the state, being indigenous, being LGBTQ.**” Garrett Lankford, a former organizer with the Montana Human Rights Network, emphasized the advocacy organization’s use of a human rights framework to address various issues, including LGBTQ rights, white supremacy, and health care.

**We really learned partway through [that] we have to trust what we know to work. And every state is going to be a little bit different.**

MOLLY MCCLEERY

Lankford noted the entry point for the Montana Human Rights Network to work on Medicaid expansion was a way to combat white nationalism and anti-Semitism. He explained further:

*There's a large and active white nationalist and white supremacist movement. Sometimes they're separate, sometimes they overlap. And one of their main goals in Montana, and throughout the United States, is to make sure that government and democracy only functions for those who are white males, cis-het white males... And so through our research, we noticed that a lot of times their recruiting techniques were on political issues that weren't quite as icky. You can justify opposition to Medicaid expansion a lot easier than you can justification [oppression based] on someone's race. They use these policy areas as recruiting tools. And so that was our key.*

Organizational actors in Montana clearly perceive the interconnected nature of health care access to systems of oppression and used these lenses in their efforts to pass I-185.



GARRETT LANKFORD

# Indigenous Health, Native Sovereignty, and Tobacco Use

Attunement to the interests of sovereign Native nations and to indigenous cultural practices in Montana was an important element that shaped some campaign concerns. Central to the goal of Medicaid expansion was the importance of this program in serving Native communities. Amanda Frickle, Director of Montana Voices, which is a statewide civic engagement project, pointed out that because Montana's indigenous communities benefit from Medicaid, they have a "vested interest" in ensuring the program's continuation. Others, like Ta'jin Perez, echoed this sentiment. Perez is the Deputy Director of Western Native Voice, Montana's only statewide advocacy and organizing-focused organization working with tribal nations. Perez asserted, **"One of our top priorities is health and safety for communities, understanding that tribal nations and Native American folks face large disparities in health care and health outcomes."**

**While the benefits of Medicaid expansion were fairly straightforward for tribal nations and Indigenous people, the tobacco tax proved to be more complicated.** Western Native Voice works regularly with tribal governments to discuss and strategize around current events and policy. One piece of building support among tribal governments was to explain the implications of the tobacco tax and assure them that **the tax would not apply to their sovereign nations.** The second challenge around the tobacco tax was the confusion around which tobacco products would be taxed. This concern was particularly important because of tobacco's importance and usage in Indigenous ceremony. Perez explained that Western Native Voice's

team of organizers' biggest task was to educate Native communities about the details of the ballot initiative, specifically around these questions of tobacco's use in traditional ceremony:

*With the tobacco tax initiative, one of the things that was incredibly important was to educate communities. At first, there was a misconception. Because tobacco is an important part of ceremony for many tribal nations and tribal traditions, there needed to be special education and messaging on, "This is [a tax on] commercial tobacco," dispelling how this tax would not be levied within tribal nations, because that [was] not the purview of it.*

For Perez, education around the specific impacts on Native communities was key to building community support.



# **KEY MESSAGING & FRAMING: Reactionary Messaging to Big Tobacco**

**One tricky component of I-185 was how to message a ballot initiative that proposed two separate policies: a tobacco tax and Medicaid expansion. Questions around messaging and framing the campaign needed to account for the best approach to the disparate issues. Heather O'Loughlin, Co-Director of the Montana Budget and Policy Center, surmised that the two distinct issues “ended up confusing voters a fair amount.”**

Several respondents noted that early on, the campaign was on the defensive, needing to respond to Big Tobacco's campaign against the ballot initiative. Not only did they find themselves in a position of having to defend or reframe the conversation around the tax, but also they were fighting misinformation spread by the tobacco industry. As Frickle put it, the opposition was inaccurate: “It was not necessarily based on facts.” Ella Smith, Program Director for Montana Women Vote, specified that the disinformation campaign by the tobacco industry focused on framing the ballot initiative as an unfunded mandate and questioning its constitutionality.

To combat this framing by the tobacco industry, organizers took several approaches. First, many respondents described a strategy of shifting conversations with potential supporters from taxation to a focus on the benefits of Medicaid expansion. Smith detailed Montana Women Vote’s approach:

*Our main message was: the amount of people who rely on Medicaid expansion and the amount of time that it has been since we've raised the tobacco tax in Montana. With a sub message of how raising the tobacco tax does decrease smoking, based on a variety of different studies. So those were sort of our main messages... We really did try to focus on Medicaid expansion and the benefits to the tobacco tax, to a tobacco tax raise... We tried to do our best in terms of conversations around regressive taxes, which, especially for Montana Women Vote being a low-income focused organization, is particularly difficult within our constituency.*

Smith noted that they likely lost some potential supporters due to the complicated implications of the tax on low-income voters. Similarly, Western Native Voice focused their messaging on the benefits of Medicaid expansion. Perez recalled:

*We talked a lot about Medicaid expansion and how it was important to preserve it. We have seen that since 2015, health outcomes have improved, primarily through referrals that have been made from Indian Health Service to other, non-Native health centers. Not only did those referrals increase, but the types of services also have changed or shifted, even within a year of passage in 2015.*

# CHALLENGES

## Conservative State

Several respondents noted that Montana being (at the time) a purple state posed several challenges for I-185. First, many maintained the population's general aversion to new taxes; conservatives and small business owners opposed the tax, as did progressives who acknowledged the impact of a regressive tax on poor individuals. In addition, Republican legislators who were up for reelection and who had previously voted for Medicaid expansion in 2015 were reluctant to support I-185 publicly, despite the fact that it was a popular program in the state. The climate for Republicans to support such legislation under the Trump administration, it was feared, would negatively impact Republican candidates' electability. Last, Rasmussen noted a unique challenge with conservative media not airing the I-185 campaign ads:

*One very large media organization did not run our advertisements in the last few weeks of the campaign, unbeknownst to us. We purchased time. And it was a significant buy in Montana standards—over \$100,000 in media buy—and in communities where we needed to be strengthen ourselves and push through. And here we are five months after the event and during the reconciliations, and we were remitted over \$100,000 because this media company chose not to run the ads. Again, we didn't know that. We thought our ads were running. So very conservative media companies that own local broadcast outlets, we need to be sensitive to that because someone needs to really watch very closely to ensure that what you're buying is actually getting on the air.*

**These various challenges are important lessons for running ballot initiatives campaigns in contexts that are politically less advantageous.**

## Big Tobacco

**By running a ballot initiative that merged Medicaid expansion with a sustained way to pay for the program with a tobacco tax, the campaign invited Big Tobacco's opposition.** These proved to be the biggest blow to the campaign; 100% of individuals interviewed who worked to pass I-185 raised the issue of combining the two issues as a challenge and lesson for future campaigns. Amanda Cahill, Government Relations Director of the American Heart Association in Montana and North Dakota, recalled, "Medicaid expansion polled really well, and so did the tobacco tax," but also explained:

*Marrying [Medicaid expansion and a tobacco tax] can sometimes create an opportunity for the tobacco companies to come in and really create confusion and draw false parallels. One of their big tactics was saying this is an unfunded mandate to require Medicaid expansion, and that the tobacco tax wouldn't cover it, which was untrue. But [it was] a really, really good talking point that they just blasted out there and beat us up on.*

Others, like Frickle, mentioned the fear of big tobacco entering the debate because of the money they could throw behind the opposition. Because the initiative had two policy components, the I-185 campaign and coalition partners were tasked with developing a clear framing of a complicated ballot initiative, and also combatting the disinformation campaign being spread effectively by the opposition.

## Timeline

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Part of I-185's challenges in confronting the opposition was related to its rushed timeline. Several interviewees mentioned that they were behind on spreading their framing of the issues to voters. Beyond messaging, building out the organizational infrastructure of the campaign was also slow. Rasmussen explained, "We brought in someone to run the organization, to run the initiative, who was a past democratic lawmaker, very gifted. They helped to bring some support and some guardrails around this so we could move forward.

I believe had we done this earlier, we would have passed the initiative. But we were late in the game."

**Having ample timing is important for any ballot initiative campaign, but it is especially important for campaigns facing strong opposition so they can get their messaging out early, and develop a strong ground game strategy.**

The pay-to-play model was raised as problematic by a national partner that joined the coalition late in the game. Jonathan Schleifer, Executive Director of the Fairness Project based in Washington, D.C., noted that he had a hard time recalling the coalition partners for I-185 in Montana. This, he explained, was a failure on his organization's part, to get involved in a campaign such that they were not working closely enough with organizations on the ground:

*I can tell you almost all of our partners in Oklahoma and Missouri or Idaho. The fact that I cannot do it from Montana speaks to the role that we did not want to have in that state. It was sort of an experiment for us: could we come in late on the invitation of a political person without the resources to have a real vote in a way that we'd want to? And ultimately the answer for us was no. We would not replicate that model again.*

Big players like national organizations are not the only ones who lose under a pay-to-play model. This approach typically leaves out the voices and needs of those most marginalized or directly impacted by the issue at hand, because the organizations that represent these communities typically are smaller and less-resourced.

## Pay to Play Model

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While organizations like Montana Women Vote, the Montana Human Rights Network and Western Native Voice were crucial to the organizing and field game that took place on the ground in communities across the state to gain support for I-185, the decision-makers behind the campaign were the larger well-resourced advocacy organizations, such as the Montana Hospital Association, the Primary Care Association, and the American Cancer Society. Cahill explained, "**There was a buy-in situation for being one of the major decision makers [for the I-185 campaign]. I forget the number of thousands of dollars you needed to contribute. There were probably like seven of us in our circle of decision making.**"

# **SUCCESSES:** **Raising Awareness and Medicaid Expansion** **Renewed through the Legislature**

While the “Extend Medicaid Expansion and Increase Tobacco Taxes Initiative” failed before voters, interviewees still reported two clear wins. First, they were able to build power for the 2019 legislative vote on the issue. Smith commented that by educating voters on Medicaid expansion, they created enough momentum to pressure the legislature:

*We did obviously suffer an overall loss in terms of the campaign, however, [we also had] the opportunity to have conversations about health care in Montana and build power around Medicaid expansion. We did pass Medicaid expansion in 2019 in the legislative session, and I would argue that that may not have been possible without the power built that happened during the campaign. There were a lot of messages to the legislature, particularly to swing votes in that 2019 legislative session, and on a lot larger of a scale than what we had seen in the past. I remember standing in the gallery and seeing just stacks of paper on particularly the seven Republicans who were identified as potential swing votes, just stacks of messages on the policy.*

Second, as stated above, Medicaid expansion was renewed, albeit with new restrictions, through the state legislature. The knowledge and interest in the issue that the campaign created helped pressure elected officials to pass the legislation.

In addition, the ballot initiative process allowed organizations to address the gap between the desires of their members, voters, and communities and the willingness of politicians to vote for popular legislation that falls out of step with the party line. Howell, of Montana Women Vote, explained the power and different usages of ballot initiatives succinctly:

*We have engaged in initiative efforts really since the beginning of the organization. Sometimes those efforts are really just about sort of voter education: here's what's on your ballot, and here's how to understand the initiative. In other cases, like with I-185, and several other initiatives over the years, we've taken a much more in depth role. I think we've seen the initiative process be a really important way that we can address issues that face structural barriers in the state legislature, but still enjoy wide support among voters.*



# **POWER-BUILDING ASSESSMENT: Medicaid Expansion**

**Table 4. Medicaid Expansion Campaigns  
Power-Building Assessment**

OUTCOMES		
METRIC	Yes/No	DETAILS
Newly activated individuals	NE: Yes MT: No	Nebraska effectively brought in new advocates such as Amanda Gershon who became a member of the Ballot Committee and Rich Blocker who single-handedly collected 3,000 signatures for the Medicaid expansion initiative. Nebraska Appleseed also grew their base from 1,500 to 5,000 through the Medicaid expansion campaign. In contrast, activating individuals did not seem to be a core part of Montana's I-185 campaign strategy.
New voters or communities participating in electoral politics	NE: Yes MT: Somewhat	The Nebraska Civic Engagement Table focused on mobilizing BIPOC-led and BIPOC-focused nonprofits and advocacy organizations to mobilize Black and Latinx voters. The campaign also followed the leadership of the Center for Rural Affairs and volunteers from rural counties to mobilize constituents living in rural areas. In Montana, Western Native Voice reported that every election cycle, they see greater participation from Native voters. However, with I-185, we also saw how the tobacco tax deterred some Native voters from supporting the initiative.
New organizations/programs	No	Respondents did not share information about establishing new organizations or programs for this campaign.
New networks, coalitions or organizing relationships	Yes	In Nebraska, the Nebraska Civic Engagement Table recruited the American Civil Liberties Union (ACLU), the League of Women Voters, Planned Parenthood, the Heartland Workers Center, the Center for Rural Affairs, Civic Nebraska, the Health Center Association of Nebraska, the Institute for Public Leadership, and the Brain Injury Alliance and helped them use Medicaid expansion to mobilize and organize their bases. Nebraska Appleseed also solidified itself as a hub for organizing nonprofits. In Montana, the Hospital Association leveraged its network to carry out the campaign.

Table 4 presents an evaluation of both Medicaid expansion campaigns in terms of power-building. It also provides a comparison of the two and highlights some of the ways in which Nebraska's Insure the Good Life campaign built more power than Montana's I-185 campaign.

## OUTCOMES

METRIC	Yes/No	DETAILS
New funders	Yes	The Fairness Project and Families USA supported both campaigns financially for the first time.
New audience or increased attention	Yes	Both campaigns caught the attention of national organizations who believed they had the potential to be successful, and Nebraska's campaign also appealed to more conservative voters, which is a new audience for an issue that is typically thought of as progressive.
New access to decision making	NE: Somewhat MT: No	In Nebraska, Amanda Gershon who was directly impacted by the health insurance coverage gap became a leader on the campaign and a Ballot Committee member, but overall people's existing relationships to decision-making remained the same. In Montana, advocacy organizations and hospital providers were the major decision-makers which did not create new access.
New positional power for communities that have been traditionally marginalized	No	In Nebraska, elected officials called most of the shots, with Senator Kathy Campbell as the primary decision-maker on the Ballot Committee, Senator Adam Morfeld as the primary liaison with funders, and Nebraska Appleseed and the Nebraska Civic Engagement Table leveraging their existing power. In Montana, the campaign used a pay-to-play model, which gave the majority of the decision-making power to 7 organizations that were able to make significant financial contributions.

**Table 4. Medicaid Expansion Campaigns Power-Building Assessment, *continued***

PROCESSES		
METRIC	Yes/No	DETAILS
New frameworks or narratives in explaining an issue	NE: Yes MT: No	Nebraska's campaign adopted the banner of "Insure the Good Life", a play on their state slogan, which seemed to resonate with voters. In Montana, the campaign's inability to frame the tobacco tax in a way that worked for Native people and voters on the far left harpooned their success.
New organizing models, strategies or tactics	Somewhat	Nebraska Appleseed rolled out a volunteer-driven distributed organizing model, which helped grow their base during this campaign. In Montana, organizations partnered with national strategists, which was helpful for kicking off the campaign, but too far removed from the ground to build significant power.
Expanding know-how to new groups around ballot initiative or other civic engagement processes	NE: Yes MT: Somewhat	Nebraska Appleseed held trainings on signature collection and collaborated with the Nebraska Civic Engagement Table to lead storytelling trainings, educate smaller nonprofits, and encourage organizations to see themselves as advocates. In Montana, Western Native Voice described training organizers and developing new leaders, however, civic engagement knowledge-sharing was not something we heard emphasized by other groups.

## PROCESSES

METRIC	Yes/No	DETAILS
Community has autonomy and agency throughout the campaign	No	In Nebraska, the campaign focused more on capacity building and leadership development than creating processes that put community members in leadership positions. Montana's campaign took a more top-down approach that gave larger, well-resourced organizations control over decision-making, which did not facilitate community control.
Community knowledge is respected in the process	Somewhat	The individuals who were activated through Nebraska's campaign sang Appleseed and OTOC's praises for how respected and valued they felt. This did not necessarily transfer into large-scale community influence, but it does signify that community knowledge and input was valued. In Montana, the campaign did not seem to focus its energy on uplifting community knowledge, but it did defer to culturally specific groups such as Western Native Voice. Montana Women Vote also has an advisory board made up of people who live across the state, which suggests that there is respect for community knowledge.
Campaigns are accountable to community members	No	Respondents did not share information about mechanisms to prioritize community accountability.

## **TAKEAWAYS FOR POWER-BUILDING AND STRENGTHENING MEDICAID ORGANIZING ECOSYSTEMS**

### A Grassroots Relational Approach Builds More Power

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The Medicaid expansion case studies provide an interesting juxtaposition between two different approaches to advancing the same issue. Strong partnerships in Nebraska gave the campaign a wide reach and facilitated a successful grassroots volunteer signature collection drive. Their relational organizing approach also activated new advocates and organizers and built power by bringing in new people. Montana's campaign took a more top-down approach that utilized a pay to play model and was more influenced by national organizations and wealthy health care associations. Ultimately, pairing Medicaid expansion with a tobacco tax turned off voters on both sides of the aisle and disrupted some of the ecosystem's power-building potential.

### A Ground Game with Local Knowledge

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Initiative 427 was spearheaded by an organization with a deep understanding of Nebraskans' concerns and strong connections to a network of organizations. This locally rooted coalition meant that they could adapt their campaign strategies and tactics, and move away from a one size fits all model. I-185 had heavier lifting to do because the ballot initiative covered two issues; their ability to effectively educate potential voters and address the unique concerns of Native people and tribal nations around the tobacco tax was key to gaining support from these communities.

## Trusting Local Knowledge and Capacity

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The campaign and coalition of organizations working on the Insure the Good Life Campaign successfully took into account the knowledge of their communities' worldview and lived experience to shape organizing strategies and tactics. Trusting local knowledge affords adaptability in the face of one-size-fits-all strategies that are often brought in by outside experts.

## Centering Narratives of Directly Impacted

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Nebraska's campaign was successful in activating newly engaged voters and advocates because of its personal one-to-one approach and its centering of personal stories. This approach humanized what might otherwise be perceived as bland federal policy.

## Building BIPOC Power

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While Nebraska is viewed as a largely racially homogenous, white state, a racial justice lens connects the challenges of rural BIPOC communities to those faced by urban BIPOC communities.

## Protecting BIPOC Organizers

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It is important to anticipate the ways in which racism (or other forms of bias or discrimination) could arise in the day-to-day work of campaigns and organizing and, to the extent possible, shield BIPOC from these traumatic experiences by not putting them in harm's way.

## Funding and Timelines Matter

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Despite their win, interviewees in Nebraska noted the rushed timeline and the late push for funding both at national and local levels. Having partners like Senator Morfeld, who could leverage his networks for funding was crucial. More time and more funding earlier on in the process would have allowed more time during the campaign to be devoted to strategy and organizing. In Montana, the rush to set up the organizational infrastructure of the campaign and get ahead of the tobacco industry's messaging proved fatal to the ballot initiative.

## Anticipating the Opposition

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The experience of playing a reactionary role in messaging against the well-funded and early messaging by tobacco companies was the defining challenge to the I-185 campaign. Getting ahead of the opposition's message is a key takeaway. Doing so requires having resources early to combat opposition with deep pockets.

## Organizing in an Unfavorable Political Context

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In addition to nonpartisan or tailored messaging that appeals to people with divergent political leanings, several other concerns arise in politically hostile environments. The Montana case reveals the role of conservative media gatekeeping messaging from reaching potential voters and the constraints of an election cycle in which politicians up for reelection are reluctant to support an issue that falls out of step with the party platform. Though I-185 (though only by a few percentage points), ballot initiatives can be a key way to give power to voters when their elected officials will not vote in accordance with popular opinion on the issue—as was the case in Nebraska, which had tried for years to pass Medicaid expansion through the unicameral state legislature.

## Multiple Issues Complicate Messaging

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Particularly when dealing with policies that can be intricate and hard to understand, combining multiple issues poses challenges to messaging and framing a campaign issue. One way to combat this challenge may be to refrain from combining issues into one ballot measure if the framing and narrative around the issue becomes too complex. An additional solution is to center the stories of real people, to give a face and narrative to the policy.





**Waiting Area**  
to move for  
with disabilities

