

Let's Talk About Data!



#PoweredByPowerCoalition

Progressive Data Management

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Progressive Data Management

What is Progressive Data Management?

- a way to pull out meaning and value from data that is collected within an organization.

Why is it important?

- Organizations have to find ways to quickly implement and utilize the data they already have, it's essential that you learn how to make the most of the information.

Power Impact By The Numbers:

We engaged with 465,406 infrequent and semi-frequent voters of color. 278,399 (59.8%) of those people voted.



342,994 more total votes were cast in the 2019 Runoff than in the 2015 Runoff, and voters of color accounted for 136,070 (39.7%) of those votes.



Nearly 50% of all registered voters of color voted in November (total voter turnout was 51%).

To reach those 465,406 people, we made 1,273,213 total contact attempts:



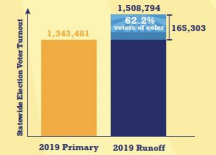
385,286
doors knocked



308,620
phone calls



579,307
text messages



165,303 more total votes were cast in the Runoff than in the Primary, and voters of color accounted for 102,835 (62.2%) of those votes.

Voters of color accounted for 34.5% of the total votes cast in the Runoff, which is a record for modern Louisiana elections (surpassing the 2008 and 2012 presidential elections).



By the Numbers



144,971
Doors Knocked

Over **1 Million**
Social Media Impressions



Over **70,000**
Texts Sent to Get Out the Vaccine

Over **287,000**
Calls About Vaccines



By the Numbers



Over **925,000**
Texts Sent

Over **138,000**
Call Attempts



56,000
Doors Knocked

10
Candidate Forums Hosted



224,383
Doors Knocked



Over **208,496**
Calls Made



Over **311,643**
Texts Sent



Logged Over **80**
Hours Texting



Over **529,000**
individual impressions on Facebook Ads

Over **2.6 Million**
Geo Fenced Digital Ad Impressions



450 Radio Ads

There were over **350,000** contacts made via text to ensure that community members had completed the census and provide information about completing the census.



50,000
Census Mailers Sent

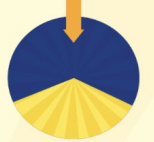
Outreach

Total Voter Turnout November 2020:
2,169,401

70.14%
Total Voter Turnout in November 2020



63.09%
of Registered Black Voters Voted in November



Runoff Election

17.8%
Of Black Voters Voted

17.2%
Of White Voters Voted



Over **50**
Vaccine Events Around the State



Over **2 Million**
Digital Ad Impressions



345,735
Calls



1,305,708
Texts Sent



95,724
Doors Knocked



2,707,884
Digital Ad Impressions

Viewing Programming through a Data Lens

- Create goals and intended outcomes while planning.
- **Speak confidently about your organizations data assets**
- Understand assets and limitations of data assets.

Tactics To Use During Program



- Canvassing
- Texting
- Phonebanking
- Direct mail
- Emails
- Petitions
- Forms
- Registrations and sign ups
- Pledges

QUALITY CONTROL WITH LARGE FIELD CAMPAIGNS



QUALITY DATA IS ALL ABOUT INTEGRITY,
HONESTY AND ACCOUNTABILITY

Create a Culture of Accountability

Canvasser Quality Control Training Agenda

- ➔ Tracking System
- ➔ How your data is used
- ➔ How your data translates to real power
- ➔ Community issues and futures are on the line
- ➔ Collecting Answers Honestly

Batch Sheets: YES HARD COPIES!!!

Canvasser Batch Sheet

Canvasser Name _____

Driver (Y/N)

Date: _____

Mileage Start Shift _____

Time In: _____ Time Out: _____

Mileage End Shift _____

Tablet # _____

List # _____

Doors Knocked _____

Question #1 - Can I still count on you to |
vote?

Canvassed _____

Yes-___ No-___ Undecided-___

Conversations _____

Already voted-___

Not home _____

Refused _____

Question #2 - How do you plan on
returning your ballot?

Inaccessible _____

Mail-___ Dropbox-___ In Person-___

Moved _____

Team Leader _____

Pledge Cards _____

Time IN _____

Time OUT _____

Voter Registrations _____

Hours in field _____

Check the Data

What is bad or suspicious data?

- ➔ Fake names
- ➔ Fake numbers.
- ➔ Unrealistic progress numbers.
Example: 20 doors per shift or 200 doors per shift, 50 calls per shift or 500 calls per shift.

I, Wanda Vote
pledge to become a Power Voter. I will:

- 1** **Vote in every election**, educate myself about the candidates, and take at least one other person with me to the polls
- 2** **Hold my elected officials accountable** by attending a candidate forum, educating them about the issues impacting my community and/or reaching out to them about important legislation
- 3** **Advocate for equity and justice** in my community



Scan here to see updated election information ➔ 

I will become a Power Voter because I care about:

- Equitable access to quality education & job training
- Workers' rights, including equal pay, living wages & paid leave
- Equitable access to affordable housing & healthcare
- Reforming the criminal justice system
- Voting rights for everyone
- Protecting immigrant families and their rights

There Should Always be Consequences Tied to Bad Data

**IF EVERYTHING
CHECKS OUT**



**IF YOU FIND OUT
THE DATA IS BAD**



Good Data Can:

- ➔ Help you understand the community you are working in.
- ➔ Establish a reputation
- ➔ Help you plan for the future
- ➔ Uncover a problem in the community
- ➔ Support a narrative
- ➔ Educate the community
- ➔ Strengthen your practices
- ➔ Evaluate your work



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Tools

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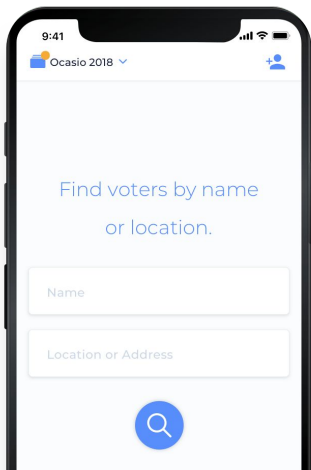


Tools:

Reach

Canvassing for events, and on the street

Purpose: Canvassing app to gather data anywhere by looking up people on the voter file.



PROS:

- Allows you to search the voter file for people you might meet on the street corner, at an event, or while site based canvassing.
- You can manually add people who aren't found on the voter file.
- Can collect information from a person and the data can be exported and loaded into VAN by an admin.
- Can recruit people to join a Reach campaign on the spot.
- Simple, intuitive GUI. Graphical user interface.
- Leaderboard could create friendly competition.
- Easy to train on and learn.
- Easily scalable and easy to input a lot of different data points.
- VAN integration in progress.
- Offline mode in progress.

CONS:

- Cost may be high for organizations running statewide or nationwide efforts.
- Must download the app to use.

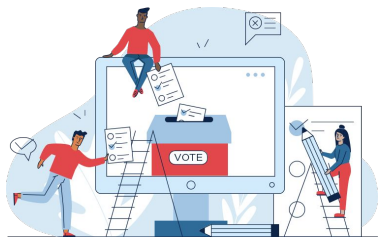
Tools:

Ballot Ready

Voter guides and ballot issue support

Purpose:

To create customizable voter and ballot guides. They gather information on every candidate in every election in all 50 states, down to school board elections. For ballot measures, they include what a yes/no vote means.



PROS:

- They pull in available online information for candidates.
- You can also add your own info (for example, a candidate survey).
- You can decide what to display on the guide. It's customizable.
- For ballot measures, they explain what a yes vote means and what a no vote means, as well as who supports a yes vote and who supports a no vote.
- As an organization, you can support either a yes or no vote and make it clear where your organization stands on the issue.
- BallotReady allows users to save candidates they want to vote for, shows them their early vote location along with directions, and reminds them about election dates by setting a calendar event.
- You can create custom voter guides for organizations.
- For an additional cost, you can track absentee ballot requests.

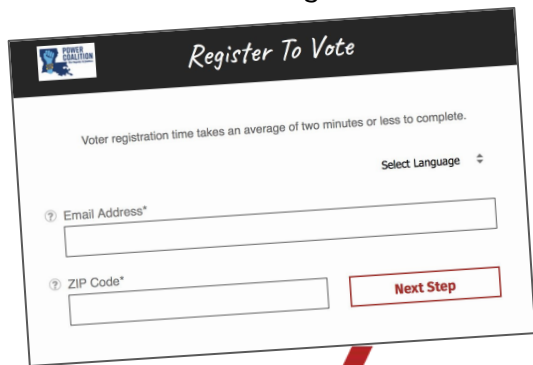
CONS:

- No sync to a CRM (Customer Relationship Management).
- BallotReady works with all organizations, regardless of their values.

Tools:

Rock the Vote

- [Online voter registration portal](#)
- [Absentee Ballot Request Tool](#)
- [Voter Status Lookup](#)
- Online Pledge Cards



The screenshot shows a web form titled "Register To Vote" with a "POWER TOGETHER" logo. It includes a note: "Voter registration time takes an average of two minutes or less to complete." Below this is a "Select Language" dropdown menu. The form has two input fields: "Email Address*" and "ZIP Code*", each with a question mark icon to its left. A red "Next Step" button is positioned to the right of the ZIP Code field.

ROCK THE **VOTE**

PROS:

- History of working with State Voices tables for over a decade.
- A clean, simple tool.
- Customizable branding that can be embedded in other websites.
- Multi-page process likely leads to higher conversion rates.
- Robust access to data that will be easy to get into VAN.

CONS:

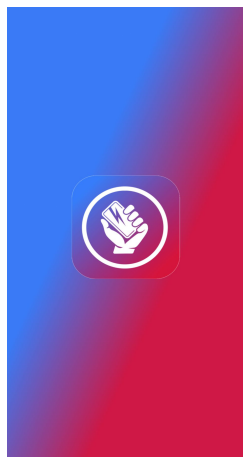
- As of time of demo, gives the voter a pdf to download if they're unable to register online, rather than mailing VR form (this is a feature that can be added on at a cost).



Tools:

Vote Force

Harness your volunteers and their connections to bring about change through this relational organizing app.



PROS:

- Messages are preloaded so you don't have to figure out what to say
- You can share messages to your personal contacts through text or social media
- Create content at scale for clients. They have graphic folks, video folks, etc.
- Big data analytics.
- They don't own the data given to them by clients, nor do they keep it.
- Progressive values.
- **Try something new!**



Apple



Google

Tools:

Action Network

CRM

Platform that includes email, actions, petitions, letter campaigns, and events.

SIMILAR TOOLS:

- SalsaLabs,
- Blue State,
- Nationbuilder,
- Mailchimp



Mobile Messaging →



Email →



Fundraising →



Petitions →



Events →



Automation →

PROS:

- Created to advocate for progressive causes.
- A variety of features for a low overall cost.
- Actions and Petitions are easily embeddable on websites.
- Interface is easy to learn without much onboarding.

CONS:

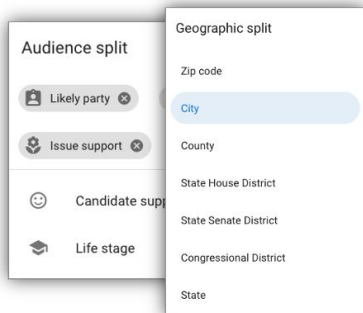
- API with VAN exists, but is difficult to set up and doesn't have a great match rate.
- No Translation ability.
- System uses email address as a unique identifier, which means that every time a person is added with the same email address it updates the record that had that email address rather than creating a new record.
- No offline mode.

Tools:

Outfox AI

Online advertising

Outfox AI helps organizations create, buy, target, and test ads.



PROS:

- Whatever language and graphics they create for the client belongs to the client.
- Multilingual communication services and capability.
- Create content at scale for clients. They have graphic folks, video folks, etc.
- Big data analytics.
- They don't own the data given to them by clients, nor do they keep it.
- Progressive values.



Tools:

- **Move On** - allows you to download signers of the petitions that you create
- **Google forms** - and email the link to folks and attach to social media
- **Targetsmart VAN** - Voter contact portal
- **State Voices VAN** - Voter contact portal
- **Votebuilder**
- **Excel**
- **Salsa** - sign up forms and action alerts
- **Blue State** - sign up forms and action alerts
- **State Digital** - sign up forms and action alerts
- **Eventbrite** - events
- **Mobilize America** - event management
- **Vote Force** - Relational organizing
- **Asana** - Task Management System
- **Slack** - Staff communications
- **Hustle** - Peer to peer texting
- **Thru Text** - Peer to peer texting
- **MiniVAN** - Canvassing for traditional door to door canvassing
- **Spoke/Dispatch** - Peer to Peer Texting
- **Thru Talk** - Cell-Compliant Dialer
- **Map the vote** - voter registration targeting
- **Resistance Labs** - 3rd party texting and script support
- **Register 2 Vote** - online voter registration portal
- **EveryAction** - Digital Organizing and online fundraising
- **Phone2Action** - online advertising
- **SAP Litmos** - Learning Management System

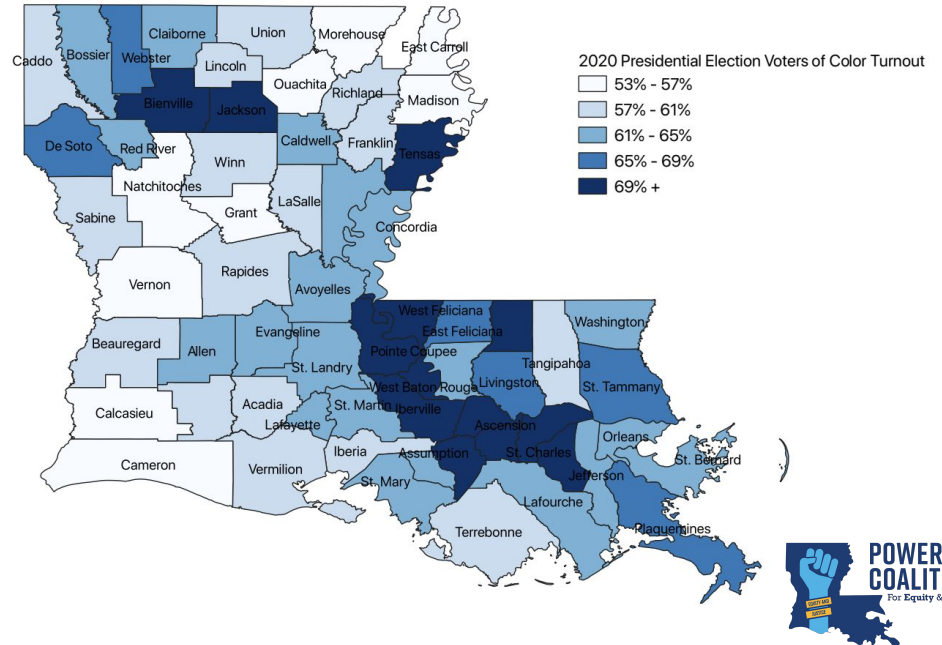
Data Analysis

Data Analysis Process

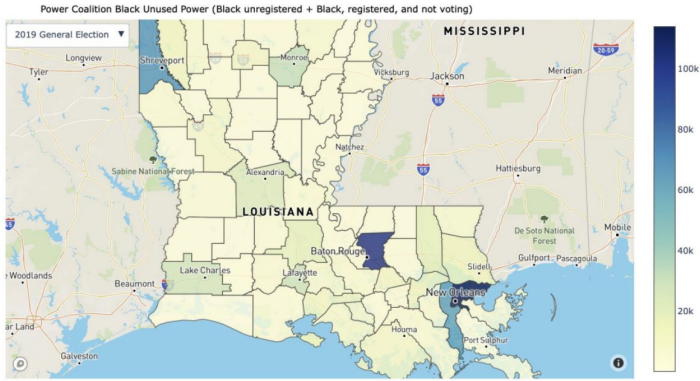
Step 1 - Evaluate - check the reliability of the data

Step 2 - Clean - sort and classify data

Step 3 - Summarize - perform statistical test and analyze the results



Data Analysis



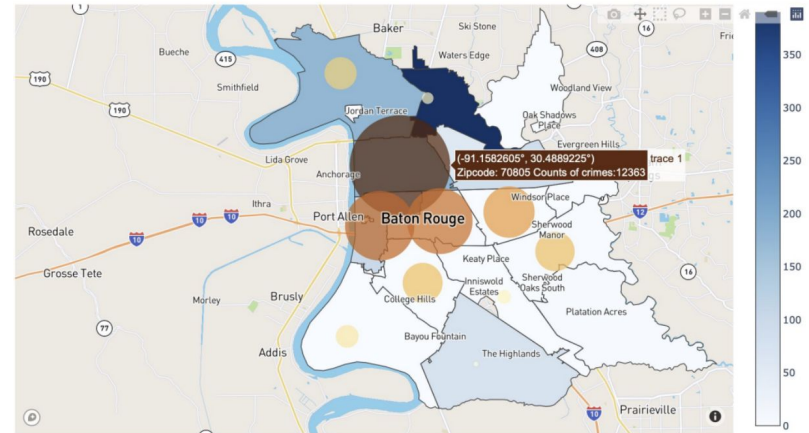
Power Coalition Black Unused Power:

Voters who are Black, registered, and NOT voting

- ➔ Used Census data to calculate Black unused power by parish in Louisiana over Time.
- ➔ This helps Power Coalition executive leadership to plan strategically around mobilizing high power potential locations.

East Baton Rouge Gun Violence Canvassing Map

- ➔ Used Python to create an interactive map in order to show gun violence rates and Power Coalition canvassing conversations at once (choropleth is conversations, bubbles are crimes).



Using Data for Effective Legislative Advocacy

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How the use of data can **support and strengthen** advocacy efforts

Grassroots

Contact with target “regular” people via phone calls, letters, public meetings, etc.

Get voters, supporters, members to take action to support a legislative outcomes

No personal connection to the target

Examples of grassroots lobbying:

- Patch through phone programs
- Letter and emails to targets
- Letter to editor campaigns
- Turnout for public meetings
- Visibility efforts
- Petition drives/more of a data acquisition strategy. Few legislators care about petitions

Grasstops

Contact with a target by more prominent folks – elected officials, community leaders, party leaders, personal fields of the target, donors, etc.

- Intercepts in person conversations
- Calls & letters from donors friends relatives
- emails/text/phone calls to targets personal accounts



Grass Roots & Grass Tops Data Tools

Data tools for grassroots advocacy

- **Match** membership and supporter lists
- **Build lists** with high activist and issue scores
- **Borrow/trade lists** between groups (with permission)
- Obtain and match list
- Unlike during GOTV, partisanship and ideology scores are ok to use, usually

Tools for grasstops

Same as grassroots

- **Match** membership and supporter lists
- **Build lists** with high activist and issue scores
- **Borrow/trade lists** between groups (with permission)
- Obtain and match list
- Unlike during GOTV, partisanship and ideology scores are ok to use, usually
- If you obtain campaign contributor lists **match them to VAN**
- **Find overlap** between contributors to your target plus membership and or high issue scores
- **Using social media and other sources determine influencers to engage**

Data Sources

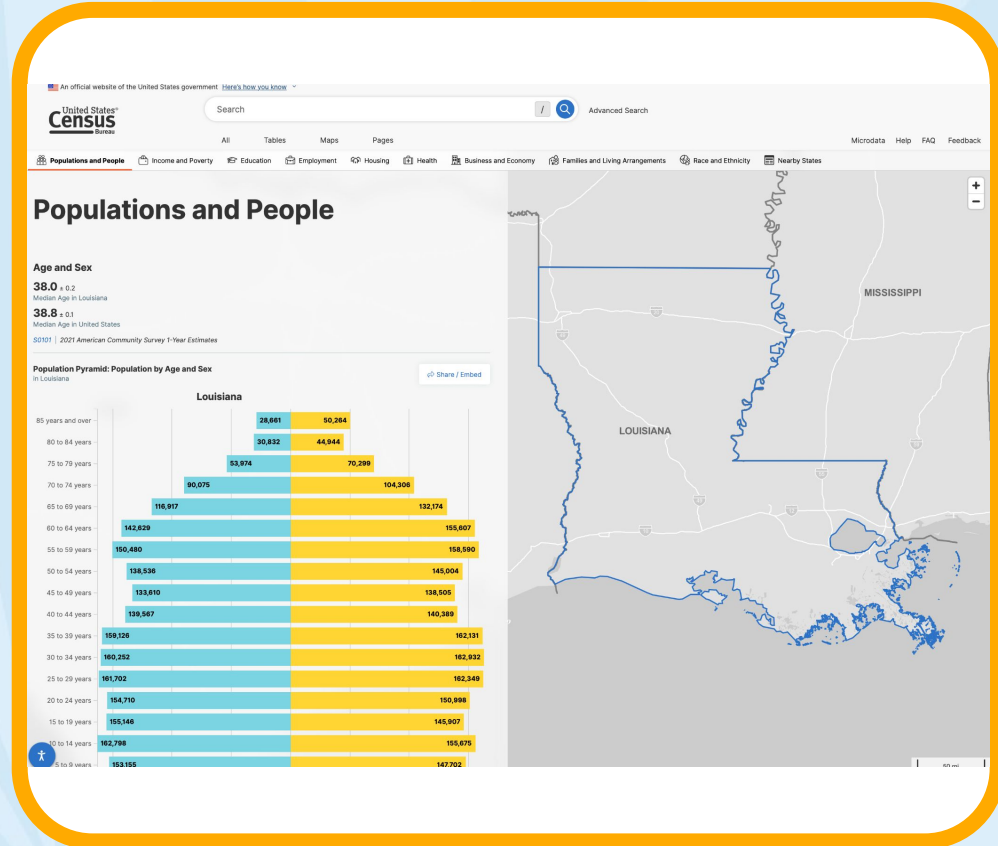
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U.S. Census

U.S. Census

- **Decennial census data** - 100% count of U.S. Population
- **Current Population Survey (CPS)** - focused on employment, compiled of Bureau of Labor statistics
- **American Community Survey (ACS)** - replaces census “long form”. Catalogs ancestry, educational attainment, income, language proficiency, migration, disability, employment, and housing characteristics.



Data on individuals

- **Provided by Data Warehouses**
- **Hosted by VAN**
- **Includes:** name & contact information, election history, district information, synthetic data, model & scores, voter registration status

Voter file information

- Voter name
- Date of birth
- Registration date
- Residential and mailing address
- Precinct
- Contact information
- Political party preference

Data and More Data

Provides **voter file & model data**

Provides two tools used by partners

1. **Q tool:** a query tool used to interact with the raw data, creates crosstabs, & statistics
2. **M tool:** import, list matching, and exports of appended data

State voter file and commercial data

1. **State voter file;** normalization, name, sex, age, addresses, race, districts, wrong history
2. **Commercial Data;** non voters, phones, geocodes, consumer behavior



Data Integration

1. Merge data sources
2. Tack records across versions
3. Track changes in status
4. Move people across states
5. Phone scores

Analytics

1. Extend data for models
2. Vote propensity
3. Marriage
4. Age
5. Income
6. Ideology
7. etc.

VAN - Voter Activation Network

The “VAN”

A software interface to **catalist/Targetsmart Data**

- Cutting list
- Voter/applicant contact
- Calling tools
- Voter registration tools

Track and Measure your work

- Monitor progress of campaigns
- Find gaps and fix them
- Collaborate with other organizations

Clean your list

- Get rid of wrong #'s and bad addresses
- Reporting - work in VAN is reported
- Go back to these voters in the future.

SmartVAN



STATE VOICES

Powered by everyaction
and Catalist Data

The logo for PDI, consisting of the letters 'PDI' in a bold, black, sans-serif font. The letter 'P' has a blue curved shape on its left side, the letter 'I' has a green curved shape on its right side, and there is a solid orange circle to the right of the 'I'.



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List Matching

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Benefits of List Matching:

Benefits of List Matching

Learn about people

- Demographics
- Voter registration
- Voting history
- Quality control
- Geography

Assess geographic participation and collaborate with other organizations

- Where is your strongest support
- Reduce duplication
- Find holes

Integrate external member databases better with VAN

- Move data between systems more easily
- Target action takers from emails, phone, and petition signers
- Fill in data gaps

What type of list can be matched:

Types of list that can be matched

- Event attendees
- Petition signers
- Members
- Activist
- Volunteers
- Supports
- Emails
- Online forms
- Action takers
- Voter registrations
- Pledges
- SMS signups
- Any list of people

How does Power Coalition Match Lists?

Partners submit a list

Data staff runs a matching program that compares information of individuals on the list to records of registered and unregistered individuals from the catalist file

The program determines whether the name, address, and other information on the partner list match with a single combination of name, address, and other information on the file.

Note: A match on name or address is insufficient; **matches must be made across multiple data fields**, increasing the importance of providing as many fields as possible.

The list is uploaded into VAN as a saved list or tagged with an activist code only visible to the partners.

A report is produced that details the demographics of the matched individual and their role history including estimates on income and other demographics such as marital status

Additional Analysis



Data fields needed to match:

Necessary to collect:

- First name & last name (Separate fields)
- Zip Code

One or more of these are very helpful;

- Street address, city, state (Home and Mailing)
- Date of birth
- Phone numbers (include separate fields for all types; cell, home, work, etc)
- Middle name
- Suffix
- Email address

List Handling

List Formatting

- Best if lists are in text format, either CSV or tab delimited. Excel can be used as well.

List Privacy

- List should be kept **confidential**
- Only data staff should see partner list
- Activist codes derived from a partner list are configured so that only the partners can view them
- Data sharing agreements should be in place

List Building

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Goals for List Building:

Short Term: Incorporate data collection into all regular **activities** such as meetings, events, phone banks, canvassing, and voter registration drives

Long Term: Build a culture where **every interaction is documented and matched** to VAN, with a high match rate for all lists.

Example: Grow your base of supporters, memberships, and or activists.

- **Short Term Goal:** Data entry for events
- **Long Term Goal:** examine programs and strategy

What Data Can You Collect:

Necessary to collect:

- First name & last name (Separate fields)
- Zip Code

One or more of these are very helpful;

- Street address, city, state (Home and Mailing)
- Date of birth
- Phone numbers (include separate fields for all types; cell, home, work, etc)
- Middle name
- Suffix
- Email address
- Birthday
- Text Message Opt In
- Interest
- Social media usernames

How is the data collected used

Goals to increase membership? What was your growth in the last year?

- Engagement strategy – Sign in plan for events?
- Voter Contact – Canvassing, etc are you reaching the ri

List Privacy

- You can track your own work
- You have proof to show to funders of exactly what you accomplished in a program or in a given election cycle
- Models are updated to become more accurate

Keeping Track of and Cleaning your List

Keeping track of your list

- Have a computer or tablet at all events
- Scan and make photocopies of all written lists and cards
 - Keep the paper copies
 - Type up data into excel directly from the copies
- Send spreadsheets to your data manager regularly
- Your data manager can match and load the lists to VAN if your group has access

How can you update and clean your list

- Drive traffic to your online forms and petitions
 - Ask for updated information
 - Link to your signup form on your email signature and on social media
 - Consider paid advertising on social media, google, or via banner ads.
- Require different fields for each form
- Regularly send out action alerts, petitions, events, etc.

Data Dream Team

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Fully Functioning Data Department - Dream Team

Director of Data

Data Manager

- Should have a thorough understanding of data management and data administration principles
- Should be familiar with modern databases and IT systems (Oracle, MySQL, MongoDB or others)
- Should be awesome at processing and evaluating large amounts of data
- Should work well under pressure—data managers need to be able to handle problems that arise efficiently

Data Analyst

- Should be familiar with data warehousing and business intelligence concepts
- Should have in-depth exposure to SQL and analytics
- Should know all about Hadoop-based analytics (HBase, Hive, MapReduce jobs, Impala, Cascading, et al)
- Should be a master of data storing and retrieving
- Should handle tools and data architecture components expertly
- Should know several ETL tools to transform different sources into analytics data stores
- Should be able to decide on critical business features in real time
- Should be an effective and confident decision maker

Fully Functioning Data Department - Dream Team

Data Associate

- Experience with the VAN (Voter Activation Network)/VoteBuilder, or other civic engagement platforms is a plus
- Experience with Microsoft Excel or Google Sheets is a plus
- Background in 501c3 work or the desire to work with progressive organizations.
- Knowledge or willingness to learn about the political landscape in Louisiana
- Experience with one of the following: Mapping tools (Examples: QGIS, Maptitude, etc) or visualization tools (Examples: Power BI, Tableau, Periscope, etc)
- Experience conducting small group trainings and developing training materials for end users.
- Experience mentoring, managing, or training staff and volunteers is preferred.

Data Fellow(s)

- learning role, with support to team.
- Strong project-management skills;
- Use and familiarity with Google Suite, Microsoft Office products
- Ability to work under pressure in fast-paced, ever changing environment



Best Practices

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Best Practices

**Be mindful
of security**

**Ethically
gather
information**

**Invest in
smart
management
solutions**

**Verify your
data**

Data Entry Best Practices

- Train your data entry people to use the same practices! **All data must be organized and entered the same way.**
- Don't let people add information to blank or incomplete fields
- Don't put a "-" or "N/A", "blank", or "unknown" in unfilled columns
- **Type in all of the data that you have**
- It is ok if you don't have full information for everyone, you may still get a match
- **Don't use shortened versions of city names** like "NOLA"
- **Use numbers for numeric street names.**
For example, E 4th St NOT E Fourth ST
- Use full address. Add in direction and suffix of streets (N Claiborne Ave.)
- **Don't add extra periods, commas, and spaces in fields**

- **Abbreviate cardinal and ordinal directions.**
The only abbreviations you should use for directions are N, S, E, W, NE, NW, SE, SW
- Use a space before a floor or apartment number
- **Unit and apartments should be noted as abbreviations:** APT, BLDG, FL, STE
- Enter phone numbers with 10 digits and 10 digits only
- Use only standard abbreviations and no punctuation: ST, ALY, AVE, PL, BLVD
- **Do not enclose data, or any field of data in single or double quotes**
- Do not include comma, dollar signs, spaces, and extra zeros in numeric fields
- Do not use periods, commas, or dashes in addresses

Data Collection Best Practices

- **Consider making data collection a competition** and offering incentives
- **Have a computer or tablet at all events and meetings** so that attendees can enter in their own information, minimizing data entry errors
- **Collect Home addresses and personal phones & emails if possible.** It is always much harder to match business information.
- **Make copies of all paper data entry forms** or scan them to a shared drive so that they do not get lost.
- **Accuracy in data collection is vital to this effort.** Incomplete or inaccurate data will not always match to the VAN and is therefore not always measurable.
- Volunteers and staff collecting this information in person should be trained on how important generating signups are and **how to collect complete and accurate information**
- **Online forms should have required fields** and a clear form for what data will be accepted
- **Have separate fields for different types of phone numbers** (cell, home, work)



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