Understanding the Data Cycle during the Electoral Cycle

Updating your contact list with important info – voter history, issue interests, contact info, demographics, canvass responses etc – is key to building your base and move your ongoing organizing work, especially for that next campaign.
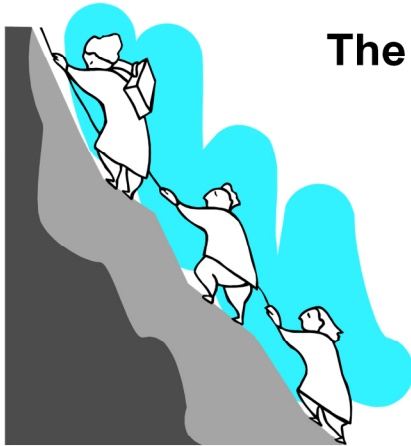
The Challenge:

To be able to collect, store and retrieve that information when you need it most.

Classes of Information

District info

Voting history

Canvass results

Attributes of people, demographics

Understanding Classes of information and knowing when you and how you use the data

- **District info** – begin using this in early phase for targeting during your voter engagement or for your ongoing organizing work
- **Voting history** – you get this during the post-election phase – you can see who voted this cycle, but you can also use prior voter history in your early phases to help target your list for your campaign
- **Canvass results** - Engagement history/responses – door knock or phonebank results, new names; you may see this info during your voter engagement work or
- **Attributes of people, demographics** – information from the voter file or from your organizational database
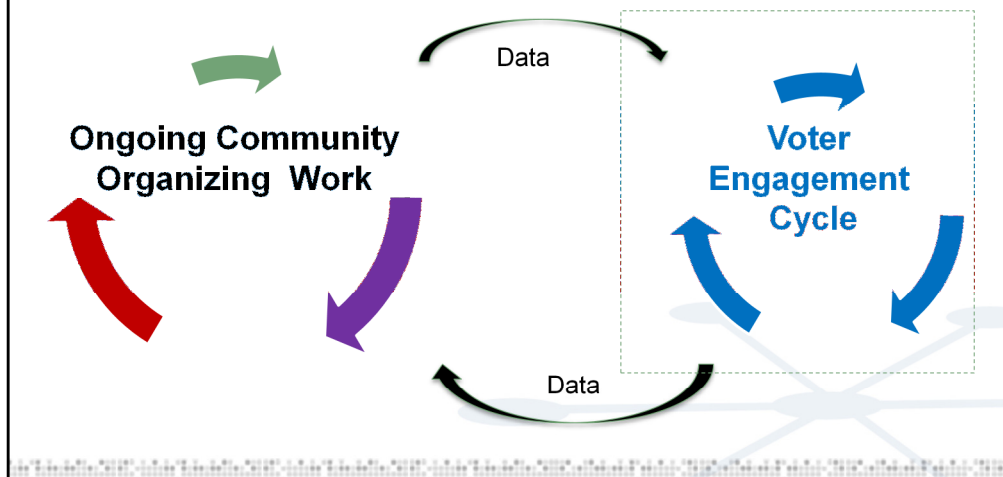
Understanding this life cycle will give some clarity as to where you need to capture and do your work – your organizational database (PowerBase) vs. your voter database (VAN / PDI).

In addition, specific activities you'll be conducting during the voter cycle, will also determine your data cycle – flow of information between PowerBase and VAN/PDI and which database tool you'll be conducting that specific activity – e.g. door-knocking activities, or email blasts to turn out folks to an event.
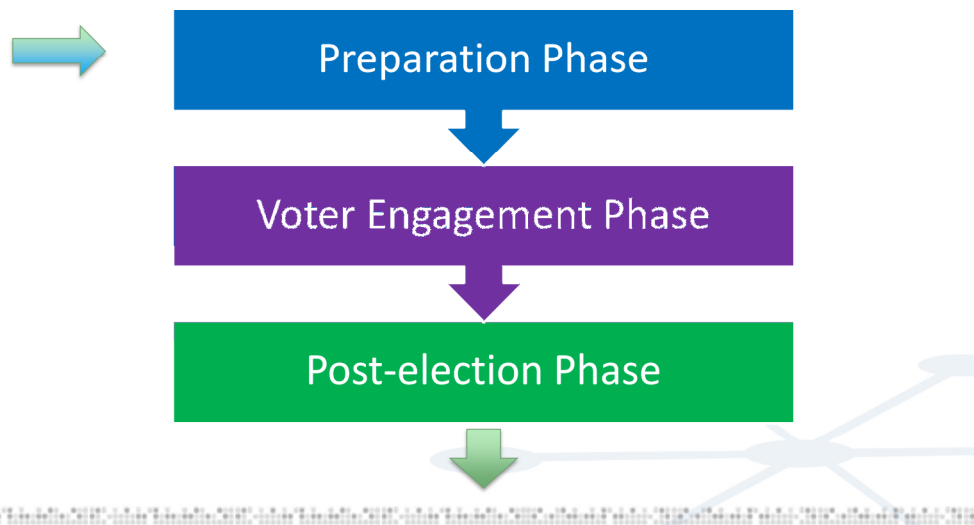
Voter Engagement Data Life Cycle
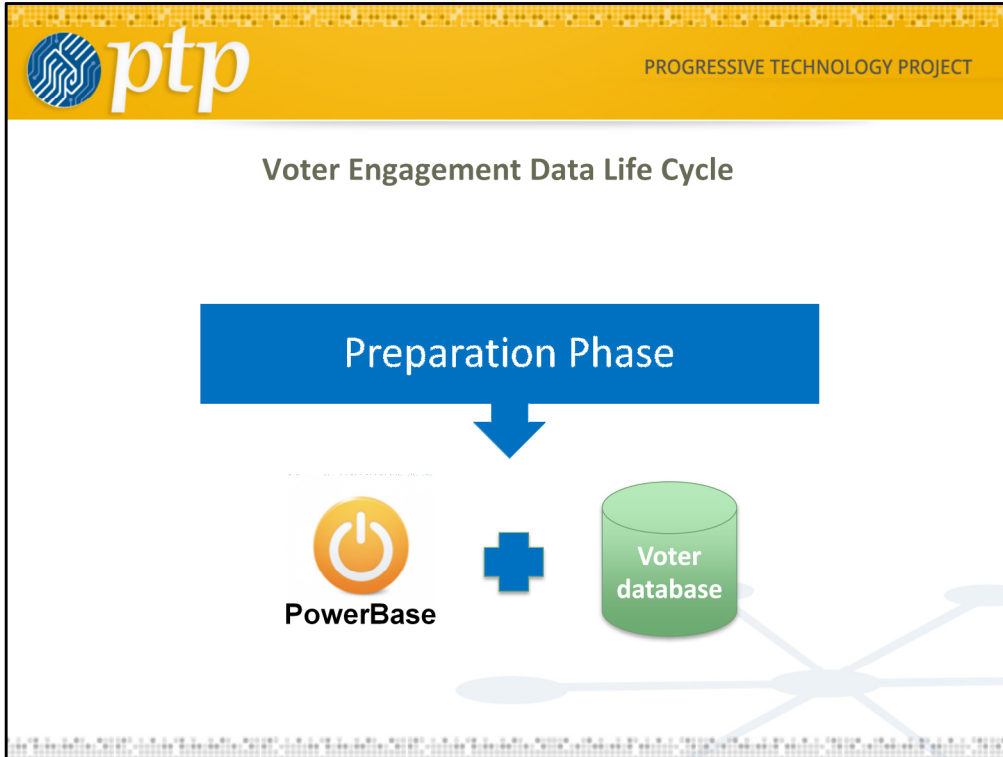
Preparation Phase: List Enhancement or Exporting or using straight up voter file

The data you work with will depend on the targeting decisions you've made during your campaign planning, e.g if you're planning on turning out members, you'll want to do match against your member list and the voter list to get updated data on voter info, addresses, voter history, demographics, etc. You can see who's already registered. **This is called a List Enhancement**. Basically it's an export and import of your data between PowerBase and VAN/PDI (or Cicero which can provide you with district information).

Decision point: do you need to bring information back into your PowerBase at this point?

It depends if you need voter or district information to:
The district info may be all you need to identify people by precinct which could inform how you may want to do your volunteer mobilizing, or to support your ongoing work.

Decision point: Will you be targeting areas where your members live?
If not, then you may only use the voter file to target individuals for your campaign.

How to do a List Enhancement:
>**Input:** you'd find the list of members you want enhance in PowerBase, you can do one of the following:
>>and export (upload) the member list (making sure to pass your contact ID) to your voter db (VAN / PDI) – gives you all the voter history, demographics, voter info
>>export to (match with) Cicero – you can get district information – no voter history
>The district info may be all you need to identify people by precinct which could inform how you may want to do your volunteer mobilizing

>**Process:** In VAN/PDI or other method, do a match of your member list to the voter file based on name, address and connect state voter ID and other voter related information. If you're using Cicero, you match your member list the same way and connect district information.

>**Output:** bring back the enhanced information back into PowerBase.

If your strategy is to target an area where you have no members – you'll just be using the voter list in VAN/ PDI and creating your targeted lists there.

Now with your member list also in VAN/ PDI – you can cut turf and know who your members are when you're at the door or on the phone.

Voter Engagement Data Life Cycle

Voter Engagement Phase

Voter database
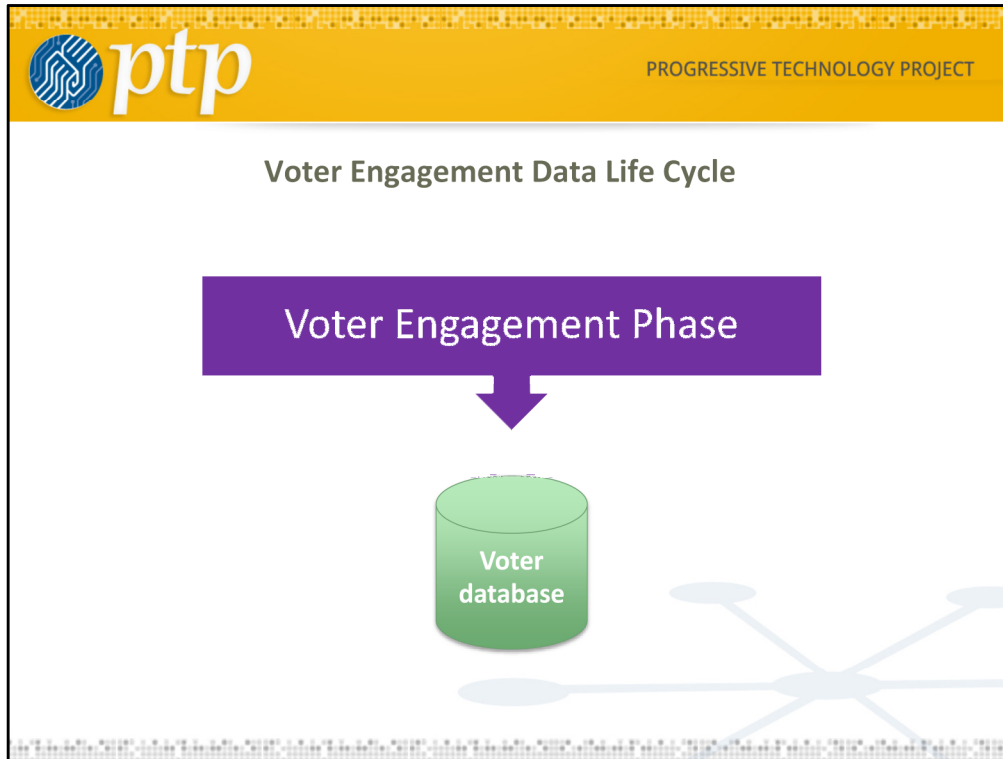
Voter Engagement Phase

This is the 'heart' of the voter cycle – a cycle of cutting turf, producing lists, conducting canvasses, updating contact information, and recording responses to a field survey – repeating this cycle until you've met your voter campaign goals.

This work in this cycle is handled in the voter database – VAN/PDI.

During campaign planning, decisions will be made on what information needs to be collected and how it will be collected. Hopefully, you'll also be thinking BEYOND the electoral cycle when deciding on information you want to know, so that your voter work can build upon your ongoing organizing work.

Challenge: recording the results from your field survey
The amount of data being collected can be overwhelming, and organizations need to keep on top of the data entry to be able to track, use, and analyze the information regularly during the campaign to see if the campaign goals are on track and to adjust the field campaign based on what field organizers are learning.
Having clear protocols of how the data will be collected and entered is key in this phase.

Within the Voter Engagement phase, your organization may decide to conduct other organizing activities such as turnout to events. Here is where you'll want to map out your organization's data cycle to figure out the who, then when, the what (what pieces of information you need), and the why you want to move information (lists) between your voter database (VAN/PDI) to PowerBase.

Question: what data do you need and what will you do with it? Can you act on it during the electoral cycle?
You can get engagement information (results from canvass) – so maybe you want to turn out folks in a particular precinct for rally on your issue in front of city hall – and you want to invite those folks you contacted at the door who identified they were interested in the issue or plan on voting.
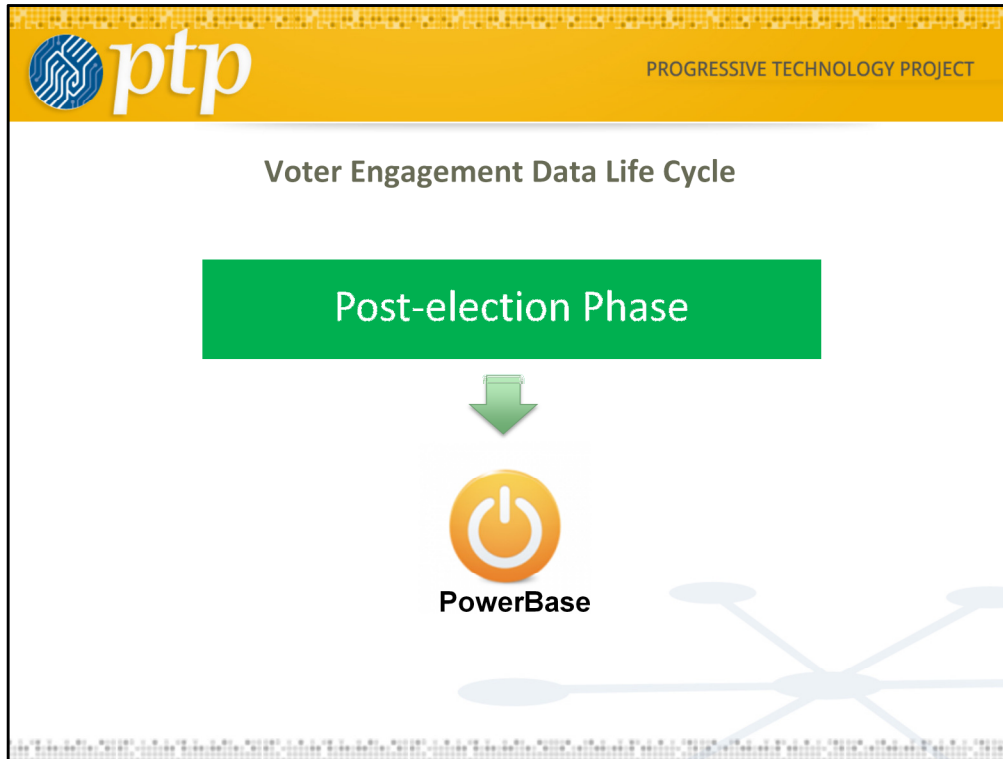
Post-election Phase

Step 1: pull contact data right away
Step 2: pull the voter turn-out

A few months after the election, the registrar will update the voter list with new voters and who voted in the election. Bringing this updated list of who voted back into your organizational database will help you analyze the effectiveness of your strategies and tell you if you've met the goals of your campaign. E.g. checking voter turnout by those who PROMISED to vote can give you insight into their behavior, or the degree in which they trust your organization, or the value of a certain contact method over others.

You don't need to wait to for the registrar to update the list before you merge the list of contacts you want from your voter work back into your organizational database, PowerBase. You can always merge the 'who voted' list later. No need to hold up your ongoing work.

Your organization will need to make a decision as to WHO from your voter engagement work you want to bring back into PowerBase and WHY.
• Who are your Hot Prospects?
• Do you want to bring back all those you made contact with at the door?
• Do you want to bring back only those contacts who responded a certain way to your field survey?

Whatever the reasons, these contacts should help you build your base, where you'll continue will follow-ups to bring them closer in to your work. Will you phonebank these folks to get them to turn out for other activities/events?
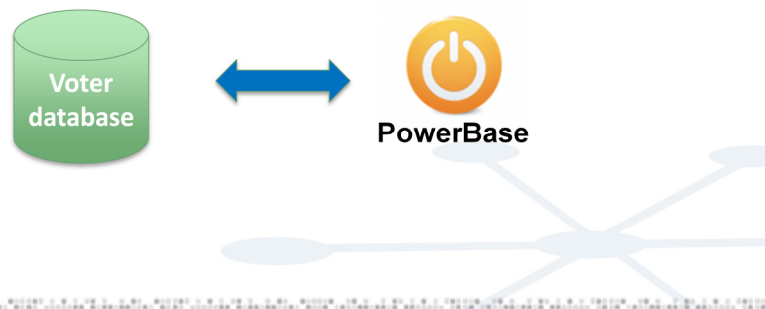
With this merged data, you can also get a picture of a member's history of activities with you by looking at the data from the voter engagement work as well as their engagement over time: did they volunteer? What issues are important to them? Are they interested in your organization? Do they vote? What activities or events do they participate in?

With each successive electoral cycle, you can integrate voter data into your organizational database that builds a wealth of information and history about your members or constituents – as well as builds your base - so that your communications are more effective, you have better understanding about what moves people to engage with your organization, and reflect on the effectiveness of your strategies.

Questions: During the voter engagement phase, what data do you need and what will you do with it? Will you be doing other organizing activities? Can you act on it during the electoral cycle?

During your voter engagement phase, you may be collecting engagement information (canvass results from door-knocking or phonebanking) – so maybe you want to turn out folks in a particular precinct for rally on your issue in front of city hall – and you want to invite those folks you contacted at the door who identified they were interested in the issue or plan on voting.

What does your Voter Engagement Life Cycle look like?