Developing a Data Plan

Many organization utilize online databases, but it can feel overwhelming to approach all of the programs and features available. While there is no one size fits all solution, establishing a Data Plan can help alleviate some of the day to day challenges of data management. Analyst Institute has provided the following framework for the development of a simple data process & architecture that are widely applicable, no matter your area of advocacy. We walk through this step by step and have provided you with a blank template at the end for your use. While we spend some time discussing the Voter Action Network (VAN) because it is a common tool in advocacy work, this process can be useful no matter what CRM you may be utilizing. In addition to this document, we recommend the *Member Engagement Guide* and *Building Power & Your List: Top 5 Data guidelines.*

Software overview

The Voter Action Network (VAN)[1] is a Customer Relationship Management (CRM) software developed for progressive organizations. It is unique in that it provides tools for organizing and political outreach, but primarily creates a database structure for organizations. While it may not serve every purpose for your organization, it is far more robust for progressive organizations than many private sector alternatives (such as Salesforce).

Developing context

Data and data systems should never exist in a vacuum. The goal of a database is to help you create a structure to inform and more easily attain your strategic goals. Before you begin a Data Plan, consider the following questions:
- What are your broad program goals generally and as they connect to SIP? Will you be focused on particular legislation, elections or other issues?
- What kind of programs have you run in the past? How did you interact with members, supporters and voters?
- Do you have "members"? If so, how do you define those members (ex: email sign-up, attends events, etc.)?
- How do you communicate with members and volunteers or voters? (ex: in person meetings, email, text, social media, etc.)
- What types of data do you currently track? Where does that data live? (Email platforms, excel sheets, etc.)
- What do you think your organization needs for your data to serve you better? This could include tool and data integration, staff time, better metrics, etc.

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[1] The technology company is NGPVAN, but the advocacy tools are often simply referred to as "VAN"

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- What are your biggest data obstacles? (ex: staff need more training on making reports)

Data plan

The following is a structure for a Data Plan. We recommend breaking a Data Plan into several parts: metrics, list matching, infrastructure, and wish list. The primary goal is to identify areas for improvement and to memorialize processes that you implement. Whether you are using VAN or another CRM for the first time or have been utilizing it for years, this can be a useful exercise for your organization.

Metrics
First, conduct a general dataset assessment

1. What types of data do you currently track? For each data set type, approximately how large is your list?
    a. Membership lists (opted in lists)
    b. Voter file data
    c. Email subscriptions
    d. Text message subscriptions
    e. Fundraising data, including payments
    f. Other _____
2. For what geographies do you have voter file access? Are there any limitations to your usage of voter file data that you are aware of?[2]
3. Is there a software or repository other than VAN that you consider your master data set? For example, your email software may be your primary data source if you mainly interact with members via email.
    a. How much of your data do you think is currently captured in that master data set? (e.g. how much data is floating in random spreadsheets)
    b. What do you think is missing?

Next, evaluate and create a simple data "architecture" Imagine entering a chaotic storage closet to find a box of staples, but you can't because there's no organization system and nothing is grouped together. You end up causing a bigger mess in your hurry to find any fastener, even though it's not the kind you need. But if all of your staples were together in the same place every time, it would be much easier to narrow down to what you really need. The same thing happens to our data, and having a simple system in place can help make us more efficient. For example, if you need

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[2] 501c3 groups are generally restricted from using party information available on the file. In some states or organizational structures, additional restrictions may apply. Your state VAN administrator can provide additional insights if you are unsure of any restrictions.

people to show up to a last minute hearing at the Capitol, people who are tagged as "event attendee" may be the most likely to show up again.

Creating a standard set of "tags" or "codes" for supporters can help you distinguish between different types of supporters. A tag is any way of creating a category of people, such as support levels or actions taken.

During this process, you may need to evaluate old activist codes and survey questions in VAN. There may be defunct, unclear or out of date tags. Determine which you believe to be the most important and plan to archive the rest. Coming out of this step you should have a clear set of codes that are still in use, even if it means "abandoning" some data you no longer have use for. However, archiving (as opposed to deleting) items means you can always recover old data if it becomes useful again. When in doubt, keep it simple: you can always add more tags later.

Make a "data dictionary" A data dictionary is a simple way of creating and maintaining definitions so that we do not duplicate or lose work, simply because we have forgotten. A dictionary can be simply an excel or word document that lists each field of data you evaluated in the previous step with a plain english description.

Data Dictionary example: we recommend these 5 items as key items to de-mystify your tags and codes, but more could be added as you see fit.

Field name	Data type	Date created	Description	Active?
Member	Activist Code	01/16/2016	Online action takers and/or event attendees; subsumed out of date membership activist codes	Yes
4/12/17 Rally at State House	Event	4/12/17	Attended an in-person event (marked to specific event date)	Yes
Abortion support	Survey Question	01/16/2016	Scale of 1 to 5, out loud abortion support. 1 = non-supporter to 5 = supporter	Yes
Support:	Survey	03/05/2010	Scale of 1 to 5. 1 = pro-choice to 5 =	No: out of

abortion choice	Question		anti-choice	data scale, subsumed by Abortion Support question

List Matching

As part of Tools for All and many other VAN set ups you have the option to match your membership lists to the voter file. This process will vary by state, however, matching your file can help fill in gaps such as addresses and districts, as well as demographic data, all of which can be valuable to achieving policy goals.

Sample list matching plan:
- Full email list will be matched to voter file twice per year.
  - Once just before the beginning of the legislative session, again about 6 months later before the electoral season begins.

- Export data from email CRM
  - Include the following fields: Names, emails, phone number, address, age, gender, date of birth.
  - Export file as a .csv or .txt
  - Confirm that full list exported (correct number of records/rows) and there are no obvious problems with the list

- Send file to contact person at State Voices table with specs for matching
- After file is matched, run reports on matched data; update VAN codes

Infrastructure

This may be a necessary step to create cohesion across various tools. If you have data being combined from multiple sources (text message program, email platform, excel documents) a data infrastructure can help establish basic rules to keep data organized. Do your text message lists get automatically updated as people on the email list sign up for them? Or is there a process that needs to be in place to update it? VAN provides integration with some tools, but others will require a manual process.

Sample infrastructure plan:
Our data is warehoused (maintained) in the following places:
- Our online engagement tool: send emails, conduct A/B tests
- VAN: voter & member engagement data; track tags and codes; match to voter file

- SMS platform: maintains opt in lists of text messages; sends blast tests

Regular maintenance plan/steps we will take
- Match email lists to VAN 2 times per year; tag matches as "membership"
- Weekly: export new SMS signups from VAN, add to sms platform. SMS platform is master data set for unsubscribes
- Monthly: run reports on counts for all databases; reconcile lists if necessary
- As needed: pull targeted lists from VAN based on demographics or other data, load to email platform for targeted email outreach
- As needed: new data from events is uploaded within 48 hours of events and tagged appropriately (see data dictionary)

Wish List

To this point, your data plan should be items that you know you can accomplish, such as creating new survey question codes, cleaning up your lists or generally instituting simple "rules" that can be adhered to. However, you may have additional items you wish you had, but require more time or are out of your organization's immediate control. We encourage this process to identify ways to alleviate data pain points.

Often times, there is a workaround or available solution to some of the common wish list items, however writing them all out can help you determine their value. How much time and energy do you want to invest in a solution?

Interested in technical assistance on how to execute these steps and more? Contact your state coordinator or Meredith Kormes at the National Institute for Reproductive Health for more information on how to get connected to the Analyst Institute.

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DATA PLAN TEMPLATE

Organization:

Date:

	List types	Approximate sizes
a.	Membership lists (opted in lists)	_____
b.	Voter file data	_____
c.	Email subscriptions	_____
d.	Text message subscriptions	_____
e.	Fundraising data, including payments	_____
f.	Other _____	_____

Voter file access:

Limitations:

Master data source, if not VAN:

Data Dictionary (add fields and rows as need or copy & paste to Excel)

Field name	Data type	Date created	Description	Active?

List Matching protocol

Data contact for list matching:
               Contact Email:

List match frequency:

Data prep & export steps:
1.
2.
3.

    Specs for matching (template or data formats needed):
-
-
-

Post match steps
1.
2.
3.

Infrastructure plan/map:
For each data sources, fill out the following as needed

Data warehouse/source:
This data set is the master source for our: (emails/membership/sms opt-in/donors/etc)
The unique ID for this data set is:
This data set connects to other sources automatically: Yes/No

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