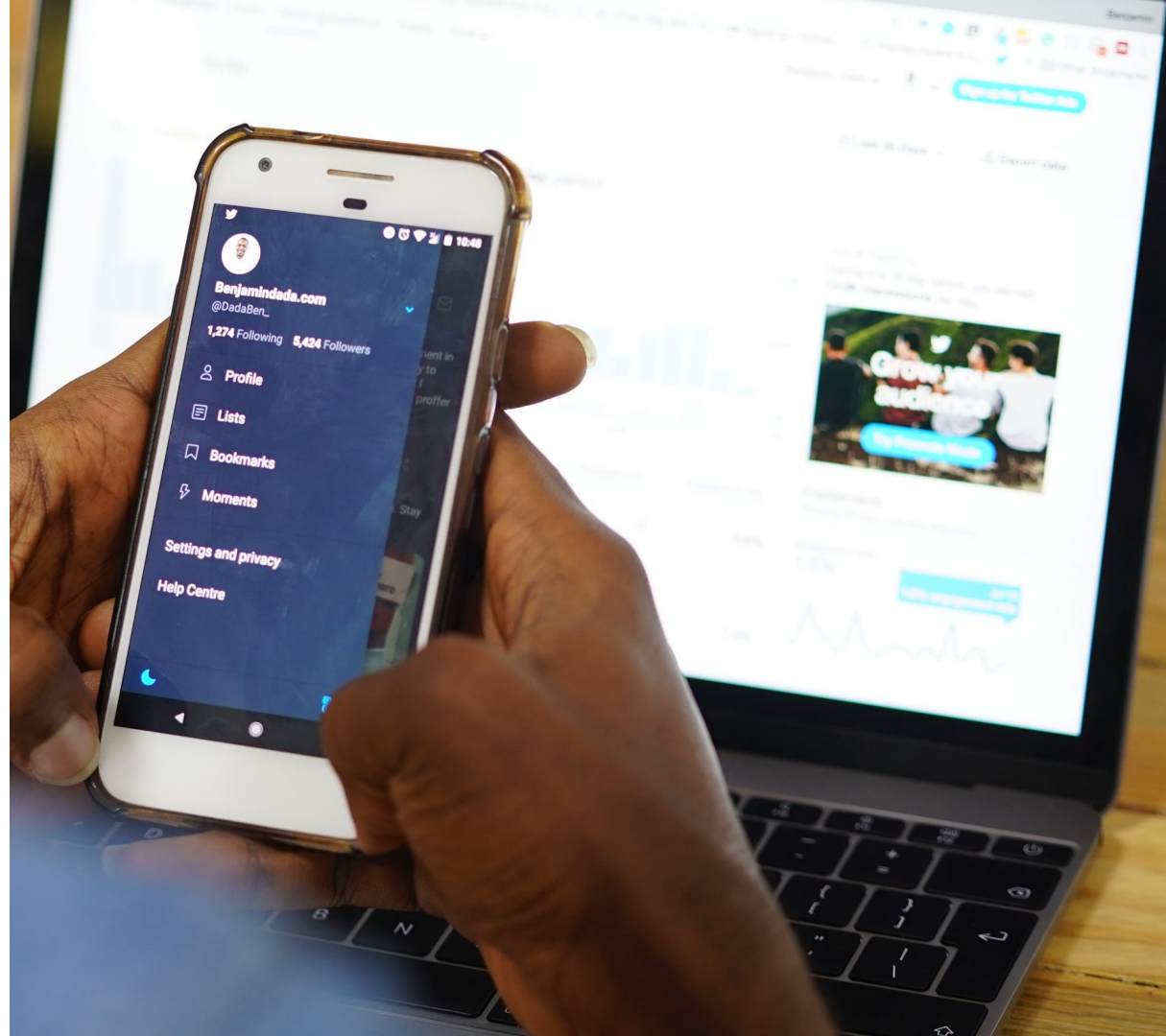


Developing Your Hard to Count List



Hi, I'm Tracy!

Engagement Director
270 Strategies



Who We Are



270 STRATEGIES

DBT

270 Strategies and Do Big Things

We are community organizers, digital strategists, communications professionals, and data scientists who have dedicated our lives to building communities, campaigns, and organizations focused on making the world a better place.

We got our start working for presidential campaigns and cause-based organizations and know that organizing starts with a deep understanding of your community. Over the last five years, we've worked with hundreds of national and international campaigns and advocacy organizations to build out their campaign and engagement programs.

**Do you have
census
specific
questions?**

Check out these census resources:

- [U.S. Census Bureau](#)
- [Census Counts Website](#)
- [Census 2020 HTC Map \(CUNY\)](#)
- [Funder's Committee Census Initiative 2020](#)

Our Process

Content will be driven by a comprehensive analysis of the field, paired with our organization's wealth of experience in relevant civic engagement work

Since October 2018 our team has conducted digital assessments of National Hubs:



Ongoing Collaboration:



The Leadership
Conference

Training Schedule

This is the fourth of five online trainings that will walk you through GOTC from **plan development to program evaluation**

UP
NEXT

- JUL 24 Crafting Your Census Campaign Plan
- AUG 13 Assessing Your Digital Readiness
- SEP 10 Content Strategy for HTC Communities
- SEP 26 Developing Your Hard to Count List
- OCT 8 Optimizing your GOTC Program

TODAY

Today's Agenda

Goals

Glossary of Terms

Reaching HTC Communities

Building a List

Data Management

Privacy & Security

Q&A and Wrap Up

Goals for Today's Training

- 1) Understand your organization's list-building needs and next steps
- 2) Learn how to manage information about your audience and take action with it
- 3) Familiarize yourself with data privacy and security best practices
- 4) Feel empowered to run a data-supported GOTC effort

Pulse Poll

Does your organization currently use a list for outreach work?

bit.ly/HTCList1

Glossary of Terms

Glossary of Terms

UNIVERSE

Everyone you want to reach through any means. *Note:* This should be similar to “audience” and be the specific group of people that you are able to reach.

TARGET

Individual person or household you want to reach on whom you have data. This is a name you have on a list.

LIST

A collection of targets. Your full list is everyone you have in your database, but a list can also be segmented into smaller lists.

TARGETING

This term is used in two ways. 1) Narrowing a list by characteristics or a model. 2) Narrowing your outreach, whether or not it is list-based.



Glossary of Terms in a HTC context

UNIVERSE

All of the people who share hard to count characteristics. Your HTC universe is a subset of people within this larger universe who you are focused on reaching.

TARGET

A person or household in your HTC universe. This may be an individual or a profile of modeled individual or household who you want to reach.

LIST

A collection of targets – everyone you have in your database or lists.

Note: can also be segmented into smaller lists, often your membership not HTCs

TARGETING

This term is used in two ways in an HTC context:

- 1) Narrowing a list by HTC characteristics
- 2) Narrowing outreach based on HTC characteristics



Reaching HTC Communities

Reaching HTC Communities

Some characteristics of HTC households:

- Non-White household
- Household with a child under age 5
- Renters and those who move frequently
- Household income less than \$35,000 per year
- Female head of household, specifically non-married females or those who live with another adult
- Less than a high school education
- Large household comprised of four or more people
- Multi-unit or mobile home structure

Are you currently reaching
HTC communities?

Who Do You Want to Reach?

Who is ***your*** focus within
the broader HTC
universe?

When you wrote your
census campaign plan,
who was your universe?

HTC Universe ≠ Your current lists?

Email List

Social
Media
Followers

Volunteers

Donors

People
You Serve
(if you are a
direct
service org)

Members

Pulse Poll

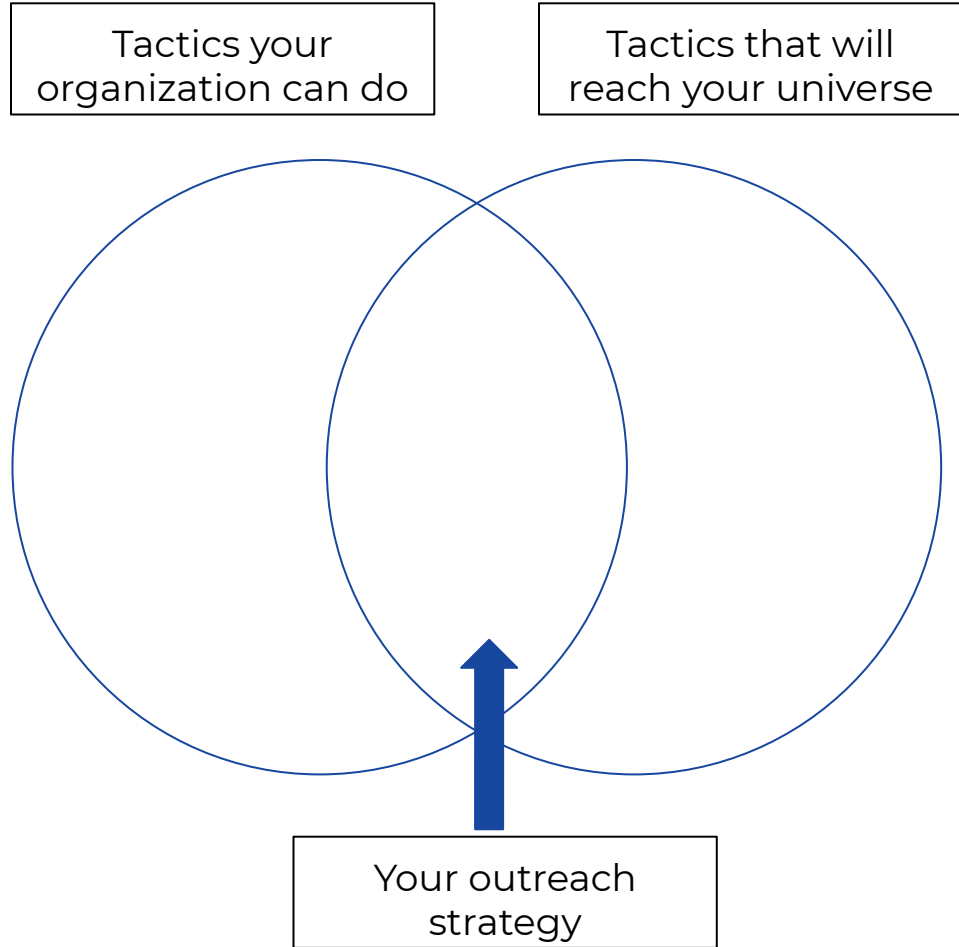
How closely aligned do you think your organization's current list is with your HTC universe?

bit.ly/HTCList2

You already know much about
your universe.

This training will present options
to support the engagement of
your universe *and* further expand
your reach specifically to **HTC**
communities.

What is the Best Way For You to Reach Your Universe



Not All Outreach Tactics Require A List to Execute

- Ads - radio, digital
- Reaching out to your existing visitors/clients/patients
- Distributing flyers
- Information booths
- Hot spot canvassing
- Hosting an event with tablets where people can fill out their form



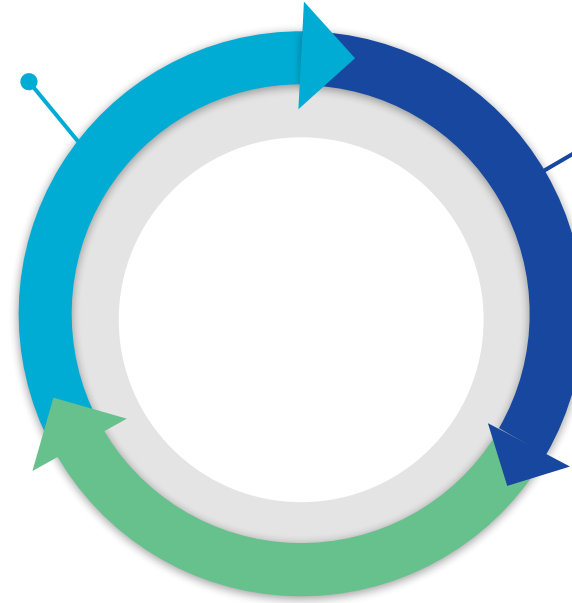
Reasons to Build a List (or Expand a List)

- You have a list, but it is not primarily HTC targets and you cannot simply narrow it/use targeting
- You do not have a list, but want to have one for future targeted outreach
- You currently work with HTC communities and want to do targeted outreach in the future
- You want to be able to track and report on your outreach work

List Building is an ongoing cycle

Adding additional individual targets to your database

Collecting additional data on your targets (email address, phone number, geographic location, etc.)



Periodically engaging your list to take action and further build your list

Building a List

Potential List Building Tactics

Online

- Acquiring voter file list to identify newly registered or “low-propensity” voters
- Using supplemental data (consumer data)
- Digital acquisition campaigns (unpaid or paid)

Offline

- Online/offline information collection program (e.g. pledge cards)
- Door-to-door without a list
- Door-to-door list cleaning
- Targeting your current list (relational organizing)

Tactic Deep Dives

Voting History Information

APPROACH:

Target newly registered or low-propensity voters for GOTC outreach. “Low-propensity” describes someone who does not regularly vote. For some communities, these groups may overlap with your HTC targets.

PROS

- Provides data with addresses, phone numbers, voting history and voting frequency

CONS

- Newly registered or low-propensity voters may not overlap with your specific HTC targets
- Requires access to a voter file, which can require time and resources

Accessing the Voter File

The Voter File

- Publicly available list
- Includes personal data -- names, mailing addresses, and voting history
- Depending on the state, additional categories like party affiliation or race may also be included

Voter File Management Products

- Access may come through a network or association (State Voices, The Movement Collaborative)
- Products enable easier access to the file, enhance the list with additional data, and provide regular updates to the file
- Target Smart, Catalist are two voter file providers
- Examples of voter file platform vendors:
 - NGP VAN
 - Action Network
 - Civis
 - PDI

Using Supplemental Data

APPROACH:

Adding additional data to your existing list allows you to understand more about who your audience is and where they are, which can help you fine tune your strategy to reach them.

PROS

- Instant access to names, addresses, phone numbers, and emails
- Saves time by improving targeting
- Supports message/messenger customization

CONS

- Potential for questionable data quality
- Potentially expensive

Example: State Voices



melissa® + ngpvan

*(household data
source)*



***A more refined and
targeted list.***

You can access this data by emailing
accesstfa@statevoices.org or visiting
statevoices.org/programs/tools-for-all

Digital Acquisition Campaigns

APPROACH:

Acquire new targets through paid digital ads that lead people to a sign up or follow a social media account. Unpaid approaches encourage sign ups through your website, emails, or social media. **Every acquisition should emphasize the collection of cell numbers and email addresses.**

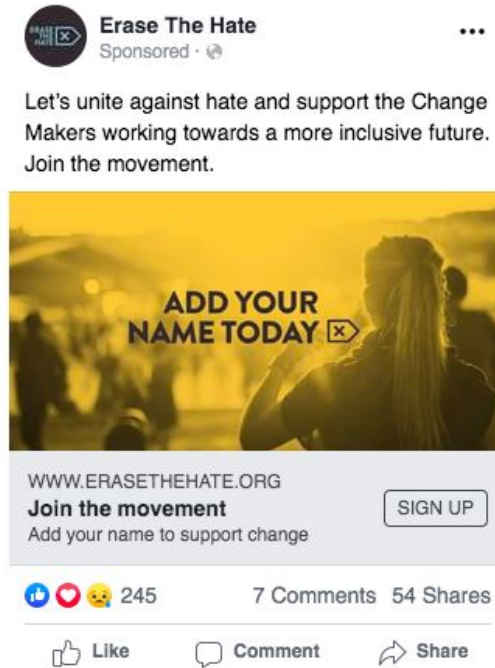
PROS

- Ability to target people, expanding your reach
- Potential to reach brand new targets and collect additional info (like cell #'s)

CONS

- Resource intensive if you pursue paid ads
- Requires quality targeting and creative
- Organic online sign ups require a significant initial follow up

Example: Digital Acquisition Ad (paid)



Erase The Hate
Sponsored · 🌐

Let's unite against hate and support the Change Makers working towards a more inclusive future. Join the movement.

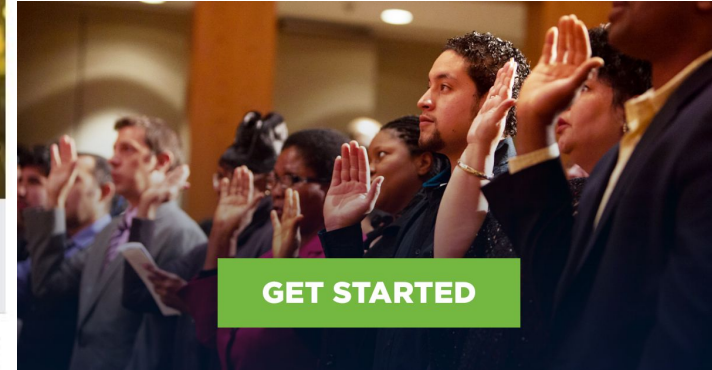
ADD YOUR NAME TODAY ➡

WWW.ERASETHEHATE.ORG
Join the movement
Add your name to support change

SIGN UP

👍❤️👎 245 7 Comments 54 Shares

👍 Like 💬 Comment ➦ Share



GET STARTED

New Americans Campaign

Example: Push Black (unpaid)



**NEED A DAILY DOSE OF BLACK HISTORY?
WE'LL MESSAGE YOU.**

Enter your 10-digit number like: 2025550317

Your Mobile Number

☐ Send to  Messenger



Approach:

1. Start with audience - digital media platform for African Americans
2. Learn about audience through research
3. Research led to a strategy to meet audience on their phones
4. "Subscriber first" approach - opt in to communication
5. Engage with storytelling and then share facts

Online/ Offline Information Collection Program

APPROACH:

Have people fill out pledge cards or petitions with their contact information. Keep fields limited to make it easy to complete and prioritize collecting email addresses and cell numbers.

PROS

- Enables both online and offline engagement
- Supports future activities - like texting
- Potentially reaches brand new targets

CONS

- Resource intensive to facilitate the offline collection (people power!)
- Requires rapid follow up and ongoing engagement

Pledge Cards

Pledge card do's and don'ts:

1. Design a pledge card that prioritizes key data (email and cell #'s) with the fewest fields.
2. Collect a data point that matches how you will contact people in the future.
3. Data from your digital pledge cards should sync to your database.
4. Ensure that there is prompt follow up with each new pledge

Example: Offline Pledge Card

FAIR  COUNT

Be the Difference.
BE COUNTED.

We won't have a fair, prosperous Georgia unless every person is counted. Commit to **be counted** today.

✓ FairCount.org



Commit to Be Counted.

By signing this card you are committing to make a difference in 2020.

YES! I will join my neighbors and the people in my community who have already pledged to **be counted**.

Signature

Name

Address

City, State Zip

Email

Phone Number

☐ Yes, send me text messages to this mobile phone number.
(Message and data rates may apply)

☐ Yes, I want to volunteer. Send me more information about becoming a Count Captain.

☐ Yes, I am interested in working for the Census Bureau and will apply at census.gov.

Example: Online Pledge Cards

Action Network Digital Pledge Card

This is the toolset our movement deserves.

We're like you: a mission-driven organization dedicated to building online power for the progressive movement. We don't have clients – we have *partners*.

Use Action Network to:

- ✓ Organize people online and offline
- ✓ Recruit and mobilize new activists
- ✓ Raise funds to fuel important work
- ✓ And much more!

HOW CAN WE HELP YOU WIN?

First Name *

Last Name *

Email *

Not in the US?

LEARN MORE

Community Connect Lab's Community Motivator Tool

Your First Name

Jane

Your Last Name

Doe

Your Work Email

jane.doe@example.com

Company

example company

Anything else?

Tell us more about your goals and how you'd like to use our tools

Contact Us

CommunityConnect Labs will help you use mobile messaging to connect with hard-to-reach communities.

- ✓ Get higher response rates from clients and collect data more quickly
- ✓ Send useful links such as live traffic, public transportation, and location information
- ✓ Easily use visual interface to build scalable campaigns to serve clients

Door-to-Door Without A List

APPROACH:

Choose a neighborhood that has the characteristics you're looking for and go to every door during the self-response phase.

PROS

- You don't need a list to get started
- You can potentially reach a lot of people, especially in HTC communities

CONS

- Resource intensive
- Contact rate on doors can be low
- People might be uncomfortable giving out personal information at the door to a stranger
- Competing priorities with elections may fatigue respondents

Example: Using Maps to Target



Census Data Mapper

Response Outreach Area Mapper (ROAM)

HTC 2020

Map Tools:

- [United States Census Bureau: Response Outreach Area Mapper](#)
- [United States Census Bureau: Census Data Mapper](#)
- [HTC 2020 -- Mapping Hard to Count \(HTC\) Communities for a Fair and Accurate 2020 Census](#)

Door-to-Door List Cleaning

APPROACH:

Go door to door asking people to confirm their information and ask for permission to follow up with them again.

PROS

- You can get accurate information that you might have been missing

CONS

- People may be skeptical or reluctant to share information
- May provide mismatched information in transient communities

Examples: Kobo Toolbox, Action Builder, + MiniVAN

minivan



KoBoToolbox

actionbuilder

List Building + List Cleaning Tools

- [KoboToolbox](#)
- [ActionBuilder](#)
- [MiniVAN](#)

Targeting Your Current List

APPROACH:

Taking a look at your existing list, and then reach out to subsets of that list. Based on the info you have about a subset, you may want to tailor your message and messenger in a specific way.

PROS

- Relational outreach to friends and family can be very impactful

CONS

- Tailoring your message for several subsets can be labor and time intensive
- Outreach may not actually reach HTC targets

Examples: Empower, Team, OutVote



Organizing Empowerment
Project

Relational Organizing Tools

- [Team](#) (*used by FairCount GA*)
- [Empower](#) (*formerly MyRVP; used by Wisconsin Voices*)
- [OutVote](#) (*used by Community Change Action org partners*)

Testing Your Tools

Tools Do's and Don'ts:

- Use tools that have been tested by organizations like yours
- Allow ample time for training and adoption - it takes practice to use something new!
- Try first as a pilot with a small number of staff or volunteers to finetune and learn

Learning About Tools

***Additional Resources you can use to
learn about the best organizing tools:***

- Democracy Labs
- Higher Ground Labs
- The Campaign Workshop
- State Voices
- The Movement Cooperative
- Community Connect Labs

Engaging your List

Utilizing a Call to Action (CTA)

- Most of your communication should include a Call to Action (CTA)
- An action the reader/audience can take
- This action should strengthen your organizing abilities
- Often will support list-building activities (give your email, cell, etc)

Calls to Action – GOTC Timeline



Education

[Now - Dec '19]

Sign up here to get
more information
about the census
[email collection]

Promotion & Mobilization

[Jan '20 - Apr '20]

Pledge to be
counted [digital
pledge card]

Targeted Action

[May '20 - Jul '20]

Come to a Census
Hot Spot

Call to Action Case Study: Wisconsin Voices



Education

Get monthly email updates from us when you take the pledge to count at wiscounts.com

Persuasion

By filling out the Census, you can make sure you and your community are counted. Join us and Pledge to Be Counted by filling out our digital pledge card.

Mobilization

Please commit to sharing and posting about the 2020 Census and encouraging your followers to take the Pledge to Be Counted on October 1.

Data Management

Choosing a Database

No Cost Options:

- Microsoft Excel
- Google Sheets
- Access through a partner (State Voices, TMC)
- CiviCRM

CRM Platforms:

- NGP VAN
- EveryAction
- NationBuilder
- Salesforce
- PDI

How to Manage your Data

Data Management Best practices

- Identify your core metrics, goals and data and capture it right away
- For Census work; these metrics and data can include
 - Names, phone numbers, email addresses
 - Confirmation of a signed pledge card
 - Confirmation of a online/offline follow up
 - Confirmation for self-responded Census
- Do not over-classify your data points
- Train well on data

Cleaning Your List

- You will need to make sure your data is accurate through “list cleaning”:
 - Make sure households are residential
 - Ensure addresses are current
 - Add residents to household
- Make list cleaning a goal of your initial door-to-door efforts
 - Plan and train accordingly

**No matter what:
track and measure
your work.**

Data Privacy and Security

Dealing With Personal Information

Hosting your data in a CRM can be a secure option, more secure than Google Docs or Excel Sheets

- Prioritize security in choosing database
- Do not collect information you do not want to hold (example: citizenship status)
- Add two factor authentication on everything
- Don't repeat passwords and use a password manager (LastPass, Dashlane)
- Train your staff or volunteers on basic security steps
- Ensure you are using secured and updated versions of softwares

Q&A

Thank you!

Next Step: Complete the evaluation, which will be in your inbox shortly.

Up next, on October 8th is:

Optimizing Your GOTC Program

Registration for this training is now open: go to censuscounts.org/digital-organizing-tools to join!