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# Surveying the Landscape of Data Integration

for State and Local Organizing Groups

May 23, 2023

**Lead researcher:** Carter Kalchik

**Supported by:** Democracy and Power Innovation Fund

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**Welcome**

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# Introduction

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# Agenda

Background, purposes & research methods

Research findings

Speaker: **Derrick Smith**, Ohio Organizing Collaborative

Speaker: **Sargeant Donovan-Smith**, We the People MI

Guiding principles, recommendations, conclusion & thanks

Questions, discussion, feedback

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# Background, purpose and research methods

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# Background and purpose

Democracy and Power Innovation Fund has been researching the state of **data integration** among state and local organizing groups this year.

Started from the perspective that we know groups have data integration challenges but we want to explore them **systematically** and **rigorously** with an eye toward **actionable** next steps.

Critical to align on the problems and start taking action on potential solutions now before we enter the next major electoral cycle.

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# Research methods

We employed three qualitative research methods:

- 1) **In-depth interviews** with 15 staff across 11 organizations.
  - 2) **Focus group interviews** with three national hubs (DPI, State Voices, and TMC).
  - 3) **“Embedded research”** with three organizing groups undertaking data integration projects.
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# Organizations we interviewed

## **In-depth interview participants:**

Color of Change  
Community Change  
Faith in Indiana  
ISALAH MN  
LUCHA AZ  
MOVE MO  
New GA Project  
Ohio Organizing Collaborative  
PICO CA  
Power Coalition LA  
We the People MI

## **Focus groups participants:**

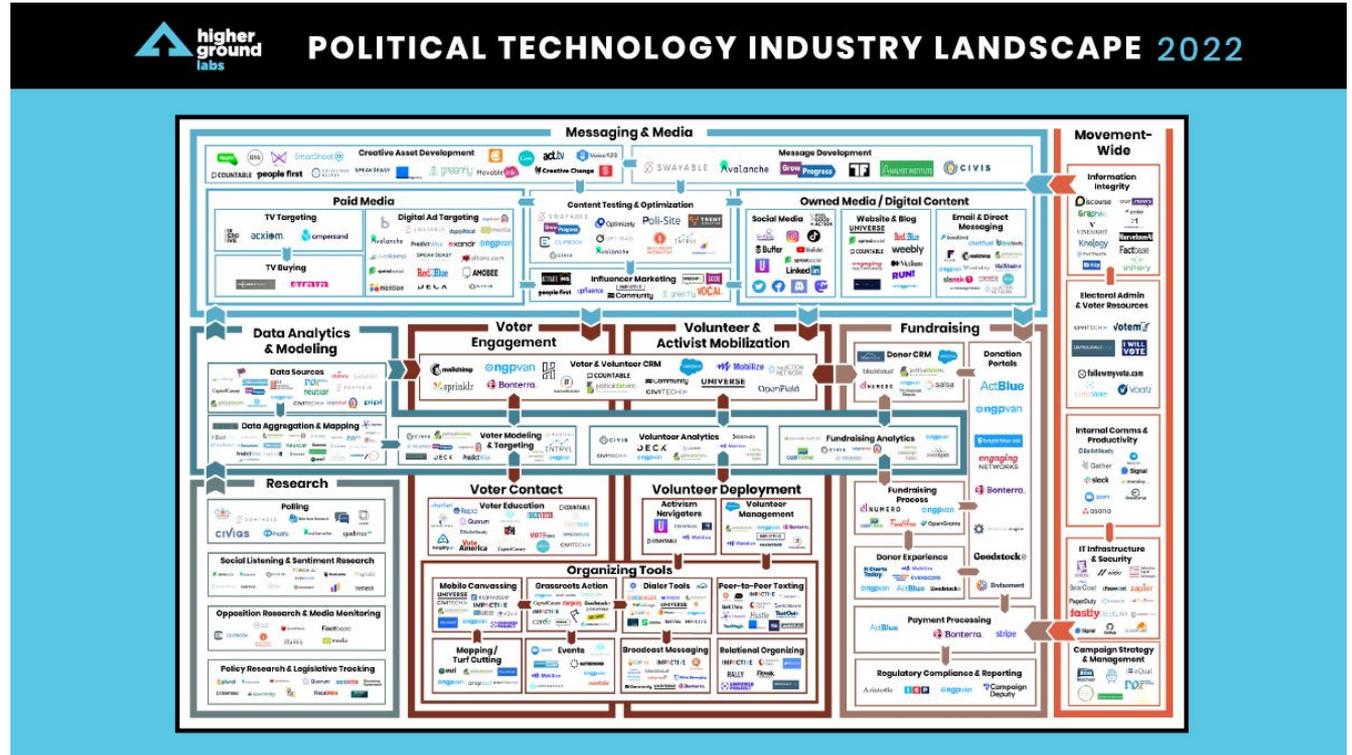
- DPI Data Cohort
  - State Voices Data Staff
  - TMC Data Staff
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# Research findings

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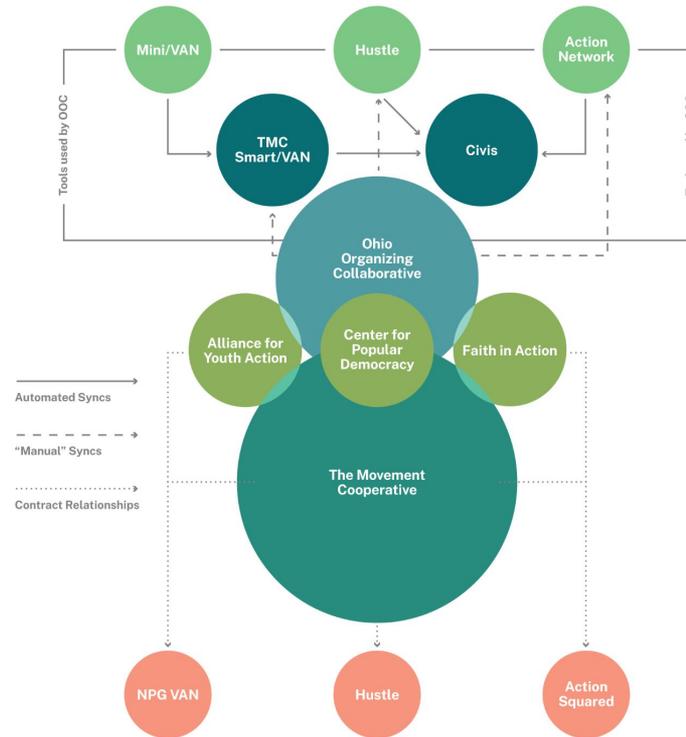
HGL's Landscape Map: this is what power building organizations must navigate when trying to decide what tools to use for their programs. It's an overwhelmingly complex map that only gets more complicated over time.



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# Research findings

*Simplified relationship map for a single state-based organization to navigate. Overlapping affiliations, lots of complicated data flows, lots of opportunity for miscommunication and many points of potential failure.*



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# Research findings

*These are major challenges that we have seen across every group that we have interviewed and worked with in 2022.*

Activists' data, and therefore power, getting lost between disintegrated tools

No 360 degree view of program

Fragmented and churning tool landscape

Unclear roles and little accountability between national networks, hubs, vendors and on-the-ground groups

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## Activists' data, and therefore power, getting lost between disintegrated tools

We've identified a host of issues including our over-reliance on data warehouses, inflexible tools, and critically, a lack of consistent identity resolution.

Not being able to reliably match and identify activists, especially between tools, leaves data siloed even when it is all in the same data warehouse.

Organizations cannot create authentic “continuity” in the relationship with their activist base and **they end up losing their most precious resources: people.**

Even those groups who have seen some success with integrating their data struggle taking it to the next level, like “understanding a member’s journey” across all of their tools.

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## No 360 degree view of program

The problems with identity and attribution lead to fragmented understandings of activist lists, but even civic and voter engagement programs are often split between different tools and are not easily integrated to create a “360 degree view” of programs.

As a result, independent power building organizations **fly blind** as they are running program, inadvertently silo-ing their relational organizing, canvassing, phone banking, texting and digital organizing.

This has consequences throughout an organization including inefficient voter engagement, and difficulty capturing learning to improve program in real time.

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## Fragmented and churning tool landscape

So many tools with overlapping purposes and the major tools change so frequently that the data and tech hubs cannot keep up with automated integration.

Organizations may be choosing between a half dozen peer-to-peer texting tools, at least two major and many more digital constituent relationship management (CRM) systems, four or more voter registration and early voting form tools, and a host of relational voter turnout apps.

There is also little to no collective accountability for new tools which are actively fostered in a neoliberal, market-based approach. This approach has consistently failed to deliver program value to on the ground groups, and requires organizations to spend significant amounts of staff time on understanding and navigating the tools landscape. **Those that cannot are simply left to fend for themselves.**

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## Unclear roles and little accountability between national networks, hubs, vendors and on-the-ground groups

Multiple, overlapping affiliations between organizing groups and national networks, hubs, and vendors leads to frequent confusion about who is responsible and able to solve problems and get work done with tools and integrations.

We have seen extraordinarily long email threads with up to five organizations represented just trying to move data from a single tool to a data warehouse—a project that should be relatively easy and routine.

Regardless of the vendor, organizations are often left on their own trying to figure out who is responsible for a tool or an integration. In the best cases, things are fairly centralized through a national hub (like AV, SV, or TMC) who can help traffic and sort through these complications. However, more often than not, even when groups are affiliated with a national hub their requests take weeks to resolve and require a lot of pushing. **Many times, critical requests don't get answered at all.**

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**Speaker:**

Derrick Smith,

Ohio Organizing Collaborative

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**Speaker:**

Sargeant Donovan-Smith,

We the People MI

# WE THE PEOPLE MICHIGAN

## How our data gets stuck

**Sargeant Donovan-Smith**

she/her/hers

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# TWO CASES

- 1 Every Action events
- 2 Organizer data in VAN



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# EVERY ACTION EVENTS



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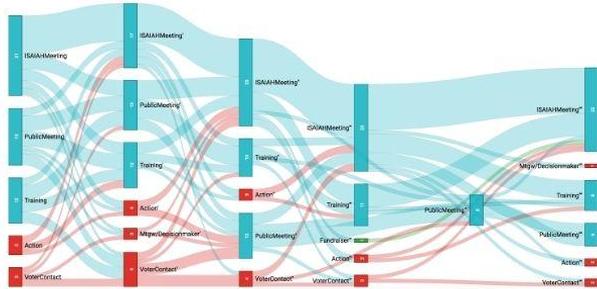


# Why events?

2020

## Delegate Event Trajectory

Notes on method for building Sankey charts



- DPI Cohort launch in March 2020
- Joined WTPMI in May 2020
- Participated in inaugural DPI Data Manager cohort to build a data and learning culture
- Exposed to work of Liz McKenna, including ISAIAMN research on leadership pathways
- Learned about The Movement Cooperative (TMC), found a way in through a funder
- Saw the TMC Every Action (EA) event dashboard as my path to get our data ready



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# Sync issues

2021-2022

- Requested the TMC event dashboard
- Discovered we're one of three orgs using an old version of EA -- dashboard isn't built for it
- Tried and failed to rewrite complex SQL to make it work
- Started to talk EA migration
- Spent '22 waiting for migration of EA to TMC version
- Finally had TMC rebuild existing event dashboard from old EA version (once I have sprint points)



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# So close!

2023

- Started using TMC version of EA, migration of old EA data 'complete' in early '23
- Briefly used event dashboard no longer works
- Request TMC EA event dashboard again, now using our TMC EA tables
- Currently waiting for updates and corrections



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# ORGANIZER DATA IN VAN



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# Who talked to voters?

2022

- Canvasser names show up in the VAN GUI, but synched as blank to VAN tables in Civis if they are volunteers

	A	B	C
1	canvassedby_id	canvassedby_username	count
2	130838433		414
3	130829321		1587
4	130781545		61
5	130840759		136
6	130773345		27
7	130770650		17
8	130773330		18
9	2197263	diego_canvas1	69
10	130773334		25
11	130770565		190
12	1549275	caitlinhomrich	193
13	130773361		11
14	130773339		39
15	130859397		66
16	130844428		776
17	130776001		9
18	130773292		86
19	1630494	art.reyes	159
20	1948345	AVMI.012.relaydial	5023
21	130776002		37
22	130828560		1404
23	130822019		1232
24	130775988		21
25	130815157		38
26	130775997		50
27	130775996		105
28	120780502		457



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# Triangulation

2022

- I used SQL to code a wild fix, using match to the Catalist voter file to find voter district, tagged back to organizers

```
, canvass_district as (  
  SELECT  
    dwid,  
    canvassedby_id,  
    canvassedby_username,  
    statehousedistrict,  
    statesenatedistrict,  
    countyname as county,  
    CASE  
      WHEN statehousedistrict=83 OR county='KENT' THEN 83  
      WHEN statehousedistrict=103 OR county='GRAND TRAVERSE' THEN 103  
      WHEN statehousedistrict=109 OR county IN ('BARAGA') THEN 109  
      WHEN statesenatedistrict=3 OR county IN ('WAYNE', 'MACOMB', 'OAKLAND') THEN 3  
      ELSE -99  
    END AS district,  
    CASE  
      WHEN statehousedistrict=83 OR county='KENT' THEN 'Jose'  
      WHEN statehousedistrict=103 OR county='GRAND TRAVERSE' THEN 'Gretchen'  
      WHEN statehousedistrict=109 AND county='MARQUETTE' THEN 'Will'  
      WHEN statehousedistrict=109 AND county='BARAGA' THEN 'Tori'  
      WHEN statesenatedistrict=3 OR county IN ('WAYNE', 'MACOMB', 'OAKLAND') THEN 'Maya'  
      ELSE ''  
    END AS canvass_lead,  
    CASE  
      WHEN canvassedby_username NOT IN ('gretchenc', 'torim', 'joser9', 'mayam', 'willl') or canvassedby_username  
      WHEN canvassedby_username IN ('gretchenc', 'torim', 'joser9', 'mayam', 'willl') THEN 'Organizer'  
      ELSE ''  
    END AS volunteer  
  FROM tmc_catalist.district_mi mi  
  JOIN voter  
  ON voter.id=mi.dwid)
```



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# THE IMPACT

- 1 Pulled away from the DPI orientation to data to solve data pipeline and tool issues
- 2 Still don't have a working event dashboard from our EA data (we're close)
- 3 Never able to present clear '22 volunteer canvassing outcomes from our synced data in Civis
- 4 Wasted time training team for things that never arrive or can't never get fixed



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# The end

## Sargeant Donovan-Smith

she/her/hers

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# Guiding principles and a few recommendations

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# Guiding principles

*In synthesizing the findings and developing our set of recommendations, we were guided by these principles. Any recommendations to solve the challenges we have outlined should strive to meet these principles.*

Efficiently and sustainably supporting state and local organizing groups who are the backbone of our movement.

Developing the skills and leadership of data practitioners for higher level data management and program analytics in organizing and political programs.

Improving the interoperability of core progressive data and tech systems.

Using our collective power to hold the tools ecosystem accountable to the needs of long-term organizing groups.

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# Five key recommendations

*Many more recommendations in our full report. These are some of the most pressing to solve the challenges we have discussed.*

“Tool baskets” - Stronger tool recommendations with tested and proven syncs from hubs and national networks.

Hub organizations should use their tool contracts as opportunities to leverage greater accountability to tool users.

Require learning and knowledge sharing provisions in consulting, vendor and capacity-building engagements with state groups.

Include source and unique ID in all platforms wherever possible.

Movement-wide API and data standards.

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## “Tool baskets” - Stronger tool recommendations with tested and proven syncs from hubs and national networks.

A strong, common theme among organizations that have been successful with their data integration is that they have a limited set of tools.

The most common way we have seen a limited set of tools achieve a high level of integration is when an organization has a single MyVoters NGP VAN committee that is directly connected to a single EveryAction committee, but it is not the only way.

**Recommendation:** Hub organizations, national networks, and their funders, in conversation with state groups, should make stronger decisions about what “**tool baskets**” they and their affiliated organizations will use, with an eye to tight integration.

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## Hub organizations should use their tool contracts as opportunities to leverage greater accountability to tool users.

As holders of contracts with most tools in the movement, the national hub organizations can use their contract negotiations as an opportunity to require greater compliance by tools with a set of expectations that would ease the burden on state and local groups and improve data integration.

For example, in order to access the progressive marketplace brokered by TMC, AV and SV, tools and tech vendors could be required to sync their data on a standard timeline, to use a standard API, to respond to group service requests on a specified timeline, and more. **While no one state group has the same purchasing power as a national Presidential campaign, collectively through our hub organizations we do.**

### Recommendations:

- National hub organizations convene early this cycle with state groups to identify the highest priority demands of commonly used tools.
  - National hub organizations require timely and robust syncing and user support in their contracts with tools and vendors.
  - Vendors who do not meet these contractual obligations should be downweighted in contracting and contract renewal processes.
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## Require learning and knowledge sharing provisions in consulting, vendor and capacity-building engagements with state groups.

All too often we have seen organizations struggle to build up their internal data and technology capacity. Only the largest, best funded organizations with the largest teams have been able to navigate the complex progressive tech space with fluency and consistent growth in knowledge and skills.

Frequently vendors and consultants are dropped into a group to provide a discrete service and then are gone by the end of the cycle. In these instances, state and local organizing groups do get sorely needed expertise but they tend to not see any improvements in their own internal capacity.

**Recommendation:** Contract holders, either national organizations or state and local groups directly, should require that consulting and vendor engagements (and any other contracts that are intended to boost state and local capacity) **include specific metrics around learning and knowledge sharing.**

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## Include source and unique ID in all platforms wherever possible.

One of the most common ways that data ends up being siloed is failure to match back to either the voter file or to a membership list. In some instances this is unavoidable, for instance any time we get user-generated data from online forms or voter registration cards. However, **a surprising amount of data siloing occurs when data leaves one system and enters another without any kind of ID to link it back.**

### Recommendations:

- Hub organizations and national networks should develop a set of standards and practices to ensure that whenever possible data exchanged between systems includes the specific source of the data and its unique ID.
  - These organizations should collaborate with vendors to make the appropriate changes to vendor platforms and data models to implement this recommendation.
  - Vendors who do not make it possible to implement this recommendation should be downweighted in contracting and contract renewal processes.
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## Movement-wide API and data standards.

Perhaps the most consistent problem we encountered throughout this research was a lack of standardization around data and how it moves and is synced. Some organizations have the building blocks for creating their own syncs and integrations: staff with the technical skills, a toolkit like Civis or Parsons, and in most cases both.

This is not the common case, however, and most organizations are just barely hanging on with what integrations exist “out of the box” or that are maintained by a national group. When those fall down or do not exist, state and local organizing groups have to use people power to move their data around or (as in Case Study 1) simply cannot run the kinds of programs they want to.

**Recommendation:** Stakeholders across the progressive ecosystem should convene to discuss the possibilities of **a movement-wide API and data standards** in 2023 and develop proposals and next steps in advance of the 2024 election season. (One attempt at this is underway with a joint project between the Community Tech Alliance, Democratic Data Exchange, and other groups. TMC’s Parsons is another good entry point for this conversation.)

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# What we need to accomplish in the next six months

- 1) Investigate and develop roadmaps, designed from the beginning for state-based groups, for adopting next generation data warehousing and dashboarding tools like Google BigQuery, Connected Sheets, Data Studio, and Looker.
  - 2) Invest in emerging CRM tools and test them out in 2023 electoral and civic engagement work with an eye to developing a new suite of options that meet the needs of state-based organizing groups.
  - 3) Recruit and build a network of senior technologists to serve as data and technology advisors to state-based organizations to provide direct coaching, expertise, and hands on keyboard solutions so groups are better prepared for 2024.
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# Conclusion

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# Conclusion

*This report is hopefully the beginning for a conversation about how to realize a better, more sustainable future in progressive tech.*

*What is needed is... **organizing**. We have a lot of confidence that this community of organizers can overcome these challenges.*

All is not lost!

Our systems are stretched because we are doing more now than ever before. More tools to reach people, more data and analytics to guide program, and more staff and organizers doing amazing work.

We have an opportunity to chart a more sustainable future for everyone but only if we listen to state and local organizing groups. The organizers and data managers working directly to build the base of our movement are not just the subjects of a poorly designed and maintained infrastructure, but also the innovators and designers of creative solutions.

**Strategic thinking**, mutual **accountability**, and **collective action** are key.

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We see this as a **starting point** for a conversation about how the **next several decades** of progressive technology should be built and maintained to help us all build a new multiracial democracy from the ground up.

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**Thanks**

# Thanks

**Color of Change:** Jamie Harris

**Community Change:** Kristee Paschall

**Faith in Indiana:** Shoshana Spector, Justin Burchard

**ISAIAH MN:** Amity Foster, Liam McMahon

**LUCHA AZ:** Adolfo Solorio

**MOVE MO:** Kaelyn Seymour

**Movement Voter Project:** Lenix Pecikonis

**New GA Project:** Friday Guilbert, Karla De Jesus, Joshua Matfess

**Ohio Organizing Collaborative:** Derrick Smith, Prentiss Haney,  
Molly Shack

**PICO CA:** Lisa Thornton

**Power Coalition LA:** Dynisha Hogle

**We the People MI:** Sargeant Donovan-Smith, Art Reyes

**Consultants:** Kassia DeVorse, Nirmal Mankani

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**Questions,  
discussion,  
feedback**