Tools For All Orientation Packet

December 2016
State Voices Tools For All Orientation Process

1. Read the following Tools For All Frequently Asked Questions.

2. Participate in a Tools For All overview call with George Christie at State Voices.

3. Obtain, complete, and return the Group Contact List to toolsfund@statevoices.org.

4. Individuals in your organization that will use the State Voices’ VAN to create lists for contact programs must attend a State Voices Data and Tools Compliance training webinar. These webinars cover the legal rules of the road pertaining to using the data in the VAN for outreach purposes. Please use this link to register for one of these webinars.

We now offer the option to complete the training on demand. Click here to view the video and take the quiz. We will review results prior to granting VAN access, so we ask that partners take their time and review responses carefully before submitting. The entire quiz should take about 30 minutes. Please click submit at the end of the quiz in order to record all results.

5. Obtain, sign and submit an electronic copy of the 2017 State Voices Memo of Understanding for Civic Engagement Data to toolsfund@statevoices.org.

6. Pay your organization’s 2017 Data and/or VAN Access Fees.

7. Before working in State Voices table states, organizations must discuss their programs with state table directors and sign a Table Partner Agreement which lists both the tables’ commitments to our partners and what state tables need from each partner organization.

8. To gain access to the VAN data belonging to another organization (this includes affiliates of your organization), both organizations must sign a Data Access Agreement and send the agreement to toolsfund@statevoices.org.

9. Complete the 2017 Program Assessment so that we can tailor our training and support program for your organization’s needs.

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Tools For All: Frequently Asked Questions

Q: What is State Voices?

State Voices is a national network of 20 permanent, nonpartisan, state-based coalitions working year-round to create a more accessible, inclusive, and representative democracy by lifting the voices of the New American Majority (people of color, single women, and millennials) and building the strength of their leaders and organizations. We believe a fair and just society can only be achieved when historically marginalized communities take their place at the center of public discourse and underrepresented populations become full participants in civic life. State Voices seeks to catalyze this social change by pursuing these three long-term goals:

- In every state where there is a State Voices table, democratic institutions will be models of inclusion, accessibility, and fair representation;
- Every State Voices table will be a hub for integrated civic engagement activity that demonstrates the collective impact of progressive c3 organizations; and
- Every State Voices table will be a transformative coalition effectively building the power of New American Majority leaders and organizations.

We employ the principles of collective impact, unifying change agents from different sectors around common goals to strengthen our democracy, building the capacity of partners with shared resources, and amplifying the voices of the New American Majority. We work in states to strengthen grassroots efforts by making efficient use of limited resources, promoting best practices, and achieving solutions no one group could achieve on its own. Through Integrated Voter Engagement – the seamless and continuous coordination of electoral, base-building, and issue advocacy strategies – our tables and partners produce more habitual voters, build the capacity of community-based organizations and their leaders, and win on issues that impact the lives of the New American Majority.
Q: What is a State Table?

State Voices sustains a dynamic ecosystem of 20 state tables comprised of 784 partner organizations in the following states: Colorado, Florida, Georgia, Idaho, Maine, Massachusetts, Michigan, Minnesota, Montana, Nevada, New Mexico, New York, North Carolina, Ohio, Oregon, Pennsylvania, Virginia, Washington, Wisconsin, and California through the San Diego Metropolitan Area table. We also train and support an additional 214 partner groups in at-large states through our Tools For All Program.

According to our most recent network census, 63 percent of our table partners identify New American Majority populations as their primary constituency, and an additional 19 percent focus on working and low-income families, immigrants, children, and the LGBTQ community.

Each table has developed a strong network of nonpartisan organizations with experience in a broad range of civic engagement activities. Through effective collaboration, the tables and their partners have won, and then assisted with the implementation of, major policy reforms involving voter enfranchisement, state budgets, health care, campaign finance, reproductive justice, environmental justice, and more. They have engaged millions of voters and have helped coordinate leadership development programs for thousands of leaders. The tables and their partners know their states well: they know the political landscape and the players, and have excellent relationships with the power brokers.

In order for an organization or affiliates to gain access to the Tools in a State Voices table state, they must reach out to the state table director in that state and explain to them the nature of the program and how that program will fit within the Table’s statewide plan as well as how the organization can partner with the state table. In order to foster productive, transparent relationships, we have developed a uniform table partner agreement. The agreement lists both the state tables’ commitments to our partners and what the tables need from each partner organization in order to achieve maximum results for our collective priorities. The partner agreements will be consistent across our network, with one version applying to full-time state partners, and another applying to organizations running short-term programs in the state(s).
George Christie can help make these introductions and will share the 2017 Program Assessment with state directors.

**Q: What is Tools For All?**

The State Voices Tools For All program (TFA) provides 501(c)(3) organizations in all 50 states and the District of Columbia with access to civic engagement mobilization resources that help them more effectively engage with their communities and one another. The program was launched in 2012, in partnership with a few forward-thinking civic engagement donors, as a way to build data-driven organizations and leaders in the c3 community. We have expanded the program to make these tools available to all of our partner nonpartisan civic engagement organizations. Today, State Voices provides 1,041 501(c)(3) organizations nationwide with access to the tools.

Tools For All provides organizations with access to online information management systems that promote organizing and activism. These tools allow organizers to move their contact lists into a central database and, through a user-friendly interface, access them and share them with partners (if they agree to do so). The tools also provide access to enhanced data about the entire voting-age population, and they help organizations manage canvass operations and data. Until fairly recently, these kinds of powerful tools were only available to organizers working for political campaigns or parties, but through TFA, they are now accessible to the c3 civic engagement community as well.

Because of work by hundreds of State Voices’ partners last year, our shared data and technology resources were leveraged to produce the following results:

- 2 million voter registration applications and 6.5 million voter contacts;
- More than 18 million points of data, including over 6 million street addresses, 7 million phone numbers, and 2.8 million email addresses added to the State Voices VAN;
- 104,276 hours logged into the State Voices VAN by 13,658 unique users;
- 82,571 lists created for direct contact programs;
• Customized quality control technology provided to 10 state tables supporting large scale voter registration; and

• Civic engagement research and experiments conducted in 9 states.

Through TFA social change 501(C)(3) organizations in all 50 states and the District of Columbia have access to the following:

• Catalyst Data¹: Catalyst maintains and constantly updates a complete national (50 States, plus the District of Columbia) database of over 310 million persons (includes registered voters and voting eligible unregistered adults). There are four main types of data included in the Catalyst database:
  ○ Registered Voters and Non-Registered persons, including their contact information;
  ○ Commercial and Census Data;
  ○ Specialty Data: Includes absentee and early vote data, licensing information, etc. Note: specialty data may not be available in all states based on applicable state voter data laws; and
  ○ Synthetic Data: Catalyst derives “synthetic data” through modeling, offering insights about persons such as relative likelihood to turnout to vote, likelihood to be married, or have a college degree. Note: some state voter data may not be available to certain customers based on applicable state voter data laws.

• State Voices Voter Activation Network (VAN):² An online platform that allows staff and volunteers to access the Catalyst data on computers, tablets, smart phones, or later model iPod Touches and deploy it to contact members, voters, people not registered to vote, friends and neighbors, or the wider community.

• Technical Support and Training: A staff of highly experienced state-based and national data and program specialists provide basic support and assist TFA participants in gaining the most leverage from both their own information and the wealth of new information to which they’ll have access. State Voices state

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¹ Our partners of the Massachusetts Voter Table utilize the TargetSmart data set, and Engage San Diego Civic partners access the PDI data set.

² Our partners of the Massachusetts Voter Table use SmartVAN, and Engage San Diego Civic partners use the PDI online software.

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table data and targeting managers administer the State Voices VAN in the 20 state table states and our national data teams administer the VAN in the 30 at-large states and the District of Columbia.

**Q: Who can participate in Tools For All?**

The State Voices TFA team will review requests from 501(c)(3) organizations in all 50 states and the District of Columbia that share State Voices’ values and do not already have Tools access through an existing State Voices state table.

Requests for TFA access will be based on the following criteria:

- Compliance with rules and legal restrictions governing 501(c)(3) organizations;
- Compliance with terms and conditions of State Voices’ Catalist and VAN contracts;
- Compliance with state laws regarding use of civic engagement data files, including use of cell phone numbers for texting or RoboCalls, etc.;
- In state table states, organizations must discuss their program with the state table directors and sign a State Table Partner Agreement; and
- Use of the data must be consistent with State Voices’ values and mission.

**Q: How much will Tools For All cost an organization?**

Since 2012, State Voices has provided 501(C)(3) civic engagement organizations with access to civic engagement data, technology, support and research in all 50 states and the District of Columbia. By sharing these resources and committing to common standards for data management and program metrics, our tables and partners have created a civic engagement ecosystem increasingly more transparent, accountable, and efficient. This model has proven to be highly cost-effective, and we estimate TFA has saved partners and funders more than $196 million over the life of the program.
In order to support the long-term sustainability of the program, each at-large partner organization will be assessed a modest access fee for 2017 to be structured as follows:

- An annual $450 State Voices VAN access fee; and
- An annual $300 data access fee

Users gain access to the VAN once the 2017 State Voices Memo of Understanding is signed and submitted;

Upon receipt of your organization’s MOU, a countersigned MOU and invoice will be returned to your organization;

The State Voices VAN access fee and data access fee apply only to the 2017 calendar year. Fees will renew each year thereafter; and

Partners can add states throughout the year, provided Attachment A of the 2017 State Voices Memo of Understanding is updated and respective VAN access fee and data access fee are submitted.

National partner organizations and at-large tables will be offered the opportunity to pay fees for their state affiliates and partners, respectively. Partners seeking national data and VAN access will be assessed based on the number of states requested. The annual fee will include a membership in the newly formed national table for civic engagement data and technology practitioners.

Organizations will not be subject to national TFA assessment fees in 2017 if they are:

- located in a state where there is a State Voices table;
- an organization that has executed a separate contract for data access (VAN access fee will still apply);
- a state-based affiliate of the Equality Federation Institute;
- an AANHPI organization funded by the Wallace H. Coulter Foundation;
- funded by the Marguerite Casey Foundation in Illinois, Louisiana or Texas; or
- funded by the Joyce Foundation in Illinois.

Certain VAN features – the Predictive Dialer, RoboCalls, RoboSurveys, Social Organizing (match a users’ Facebook friends to the voter file) and TeleTownhalls – are not part of the State Voices’ VAN subscription and organizations interested in them will need to arrange direct payment to VAN to obtain access to these features.
Please reach out to your State Voices state data and targeting manager, or contact tfasupport@statevoices.org for at-large states.

Q: What insurance does my organization need to use the Tools For All?

Partners are strongly advised to maintain general liability insurance, professional liability insurance and directors and officers insurance with a per occurrence limit of at least one million dollars ($1,000,000) during the Term of this MOU. If partner holds such insurance, it shall provide proof of such insurance to State Voices upon execution of this MOU. Proof of said insurance should be sent to toolsfund@statevoices.org.

Q: Why must an organization sign a Memorandum of Understanding for Civic Engagement Data Access (MOU)?

Each organization recognized as a 501(c)(3) that is participating in the Tools For All program must sign an MOU with State Voices that outlines an agreement for free access and use of this valuable resource. If an organization has affiliates in multiple states and the affiliates share the national organization’s 501(c)(3) status, the national organization can sign one MOU with State Voices which will cover their affiliates’ use of the State Voices Data and Tools. The MOU must be reviewed by each signing organization’s leadership and legal team and signed before access to Tools For All is given to any national network or individual group.

Organizations signing the MOU agree that they will use the Tools exclusively for charitable, educational and other nonpartisan civic engagement activities in furtherance of their exempt purposes. They agree that they will not use the Tools for any commercial purpose or any activity that would constitute intervention in an election in support of or in opposition to any political party or candidate for public office. To the extent that the Tools are used to conduct voter registration, get-out-the-vote and civic engagement activities, these programs must be nonpartisan and conducted in compliance with Internal Revenue Code §501(c)(3) and any other applicable laws.
Q: When must an organization sign a Data Access Agreement?

State Voices’ staff protects the security and integrity of our partners’ data, and our national and state data staff will not allow access to an organization’s data in VAN without our partner’s express permission to do so. The Data Access Agreement documents that a partner is allowing another organization – their national affiliate, coalition partner, etc. – access to the data in their VAN committee and that the partner is instructing State Voices’ VAN administrators to allow access to their VAN committee. The Data Access Agreement protects both our partners’ data as well as State Voices’ liability. Without the signed agreement, State Voices will not allow access.

Q: What data and information is available?

The Civic Engagement File
Each state has unique pieces of data available on the civic engagement file. In general, the list of registered voters in a state is collected by a state agency such as the Board of Elections or Secretary of State’s office and is considered to be fairly accurate. Catalist then adds information for voting eligible people not yet registered to vote. Catalist also provides additional enhancements to the data such as phone numbers, ‘change of address’ processing and data standardization. The type of information on the voter file varies by state but generally includes:

- Name
- Address (mailing and/or voting)
- Legislative Districts
- Precinct Locations
- Date of Birth and Age
- Gender
- Race
- Phone Number(s)
- Media Market
- Vote History
- Voter Registration Status & Registration Date

Census Data
The Catalist file has a wide variety of searchable census tract data that can be useful for most non-partisan electoral and advocacy programs. While new targeting
techniques described in the next section have helped to focus on the individual voter as opposed to broader geographic units, there are still useful ways to use census tract data to assist in non-profit outreach. Some of the census data available on most state files includes:

- Median Household Income (% ranges)
- Single Parents (% ranges)
- Unemployment (%)
- Ethnicity (%)
- Home ownership (%)
- Education Level (%)
- Poverty (%)
- Home Owners (%)

**Models**

Catalist has a series of models that can be used by clients. These models are usually created to predict relative likely behavior or attributes of voters using commercial data, voter file data, census data, polling data and other information. These models can be very valuable and used in a multitude of ways. Catalist, their clients, and State Voices’ partners are working continuously to create new models. Some of the models currently available include:

- Vote Propensity – relative likelihood that a person will vote in a statewide general election
- Race and Ethnicity
- Educational Attainment – relative likelihood a person went to college
- Deadwood – relative likelihood that a voter is not part of the pool of actual eligible voters
- General Activist – likelihood that a person will contact a public official
- Environmental Activist – likelihood that a person will take action on environmental causes
- Marital Status
- Likelihood to have health insurance or not
- Likelihood to be eligible for Affordable Care Act subsidies or Medicaid Expansion

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\(^3\) Not available in all states
● Issue Support Scores – relative likelihood that an individual supports or opposes issues such as immigration reform, reducing gun violence, choice, and extending equal legal protections to LGBT people.

*Organizations should consult legal counsel before using these models for non-partisan voter registration or voter contact programs.*

**Q: What is Catalyst?**

Catalist is a data vendor providing high-quality voter file data and a wealth of additional information, enabling users to better identify, understand and communicate with the people that they need to persuade and mobilize. The data is updated often and includes demographic and commercial data alongside contact and voter-related information. Catalist also develops additional data models through analysis, allowing them to score individuals based on their likelihood to vote or degree of support for issues.

The Catalyst data file is widely regarded as a critical piece of infrastructure meant to bolster the sophistication and outreach capacity of non-profits. Paired with online tools and technical support for non-profit groups to access the data, Catalyst provides enormous cost-savings by helping groups better target their outreach and organizing efforts. Catalyst itself maintains the most current voter data by regularly updating changes of address, phone numbers, and consumer data.


The Voter Activation Network (VAN) has spent over 10 years developing powerful, relatively easy to use systems throughout the country for managing all of the data that 501C3 civic engagement organizations collect on their membership and voters. The VAN is a web-based tool that makes data useable and accessible, allowing for more efficient design of sophisticated public outreach and issue advocacy programs. Thanks to software like the VAN, organizations have access to the following tools:

● List Creation: Create targeted lists for canvassing, mailings, phone banks, GOTV, and other communications with voters and volunteers. Any and all information in the database – such as demographic data,
party, voting history, canvass information, and even free-form notes – is available for these searches.

- Virtual Phone Bank: Gives staff and volunteers access to a list of voters they can dial at their convenience from their own computers.
- Turf Cutting Tool: Create and print Google maps showing the location of each door for people in a list of turf to canvas.
- MiniVAN: A mobile canvassing application that allows users to export canvass lists from the VAN onto a mobile device such as the iPhone, iPod Touch, iPad, and Android phones and tablets). Canvassers can enter data into their device as they talk to people on their list, and then upload their data back to the VAN with the touch of a button.
- MyCampaign: A suite of volunteer management tools for tracking members and activists and setting up and scheduling volunteers for events.

For a fee, users can contract directly with VAN to access their Predictive Dialer, RoboCalls, RoboSurveys, TeleTownhalls and Blast Email tools.

Q: How can an organization use this data and information?

TFA’s primary goal is to help organizations use this information effectively. There are data fields available that have not been included in this document but might be useful for an organization. TFA staff will assist organizations to get the best use of the data. In certain cases, new models and data can be acquired to aid in the implementation of a program.

List Matching
Organizations often rely on lists of their supporters for fundraising and activist mobilization. The ability to match partners’ lists to the civic engagement file can provide all sorts of information for tailoring messages to perspective or past members, activists, and donors. Also, learning more about your supporters can help to increase their involvement and activism. For instance, organizations will match their lists to identify which of their supporters are not registered to vote and then register them. State Voices will not share this list with any other entity and once the match is completed State Voices staff will return the updated list to our partner and will destroy lists provided to us for matching purposes.
Non-Partisan Voter Registration
One of the principal means of civic participation is to cast a ballot. The Tools provide our partners with the means to identify the voting eligible people within their organization and ensure that they are registered to vote. Partners can also refine their searches for unregistered persons eligible to vote in targeted geographic areas or among the populations that they serve and then register those people.

Non-Partisan Voter Education
Government impacts our lives on many levels and non-profit organizations need to keep their memberships informed and actively engaged in the issues that they care about. Whether it is making sure that members are registered to vote or persuading them to reach out to their legislators to affect legislation, the data on our file can help.

Issue Advocacy
An organization looking to support an issue campaign of any kind would be able to find prospective volunteers or activists from their support list by using the General Activist Model. Combining models and hard data can increase productivity and help to avoid overlap and wasteful spending. TFA staff is equipped to help organizations find creative ways to find the ideal voters for a particular campaign.

Building Internal Capacity
Organizations use the Catalist models and data to identify people more likely to take an action in support of the organization’s mission, to volunteer, or to come to an event. Over time these people can be persuaded to make a contribution and become a member of the organization.

Q: How is this data being used by other 501(c)(3)s?
Starting with a match of their membership list, groups can easily identify which of their members are registered to vote and how often they vote allowing them to devise strategies and programs aimed at different segments of their lists. Volunteers and staff could call or visit members that are not registered to vote, and as Election Day approaches, infrequent voters could be educated on important issues and given reminders to vote. Additionally, analysis shows that frequent voters also tend to make more reliable volunteers and donors, so efforts directed at those members can focus on fundraising and volunteer recruitment, and thus strengthen an organization’s capacity for the future. Many organizations are using the civic engagement files in
their states to identify people in areas where the organization lacks a presence to become members. And organizations are also using the Tools to identify and recruit more people so that their organizations are more diverse and better represent the communities in which they serve.

**Q: How much support will an organization receive from State Voices?**

Organizations operating in state table states will receive support from State Voices experienced team of data and targeting managers who administer the State Voices VAN in our 20 state table states.

Organizations operating in the at-large states and the District of Columbia will receive support from State Voices national data staff.