

MEMO

To: David Doonan, Seth Wooley

From: Mike Feinstein

CC: GPUS Coordinated Campaign Committee

Date: November 20, 2015

Subject: GPUS Elections Data Base Upgrade Specifications

Executive Summary: The objective of this memo is to facilitate the upgrade the appearance and functionality of the GPUS Elections Data Base.

This upgrade was initially authorized by the GPUS Steering Committee (SC) in July 2013, but was not carried out at that time, owing to scheduling issues with one of the principals.

Returning to the project at this time can give the GPUS an upgraded and functional data base by the end of 2015, so that the data base can be (1) in place for the 2016 electoral cycle and (2) used for the work of the the GPUS Apportionment Tabulation Committee (ATC).

Those carrying out the work will include (1) **Mike Feinstein** (CA), who in 2000 designed the specs for the initial elections data base used by the GPUS, and who authored the 2013 upgrade proposal; and (2) Green IT assets **David Doonan** (NY) and **Seth Wooley** (OR), whose IT skills are complementary and hence are well positions to facilitate the upgrade. Initial design work would occur upon a test site that Doonan (in his role as GPUS webmaster) would set up, before a final version of the data base would go live.

What follows is a historical background behind the development of the present GPUS Elections Data Base, following by the recommended specifications for the data base upgrade.

Background: Although Greens in the U.S. first started running for office in 1985, the decentralized nature of U.S. Greens at that time meant that there was no central, comprehensive listing of all candidates and officeholders.

As the Greens Committees of Correspondance (GCoC) - the first national U.S. Greens organization - began publishing its quarterly Greens Bulletin in 1985, news of Green candidates and officeholders first began to be compiled and shared. By 1992, the first year that large numbers of U.S. Greens ran for office, the GCoC clearinghouse in Kansas City, Missouri published a November 1992 election report and the first comprehensive list of Greens currently holding office. But there was still no single place to find such information on an ongoing basis

Starting in 1994, Mike Feinstein of the Green Party of California began spearheading the effort to periodically publish ongoing lists of candidates and officeholders, which he distributed via the old grns-usa-forum email list hosted by the San Francisco-based Institute for Global Communications.

In 1994 he was aided in particular with this effort by **Dale McMillan** (VA) and **Hank Chapot** (CA), and in 1998 by **Ben Krompak** (OH). During this period, this list became the 'list of record' for use by U.S. Greens.

In 1997 Feinstein became the editor of the newly created GreenPages newsletter of the newly formed Association of State Green Parties, which was the organizational precursor to today's Green Party of the United States. Feinstein published up-to-date lists of Green officeholders with each issue of Green Pages; and the 2000 post-election issue of GreenPages contained election results for all Greens who ran that year. During this period, Feinstein also began to publish and update a list of candidates and officeholders on his own website www.feinstein.org.

However by 2000, the number of candidates began to be too large to be managed simply by one person through the use of static .html web pages and emails. Feinstein also felt it was inappropriate for all of this party-based information to be hosted on his personal web site. As a result, Feinstein worked with **Kendra Markle** (a Green with extensive IT skills from Sebastopol, CA) to co-design a web-based data base and website to track and feature all Green candidates and officeholders. The site was to be

hosted on www.greens.org, which at the time served as a *de facto* home page for links to state Green parties across the U.S. (and provinces in Canada), along with links to other Green Parties around the world. The URL was www.greens.org/elections and it featured the numerical results for each election, and links to the candidates campaign web site, the governmental election results websites, and media articles about their campaigns.

Once the data base was established in 2000, it became important to backfill the historical record of Greens having run since 1985. Since Feinstein had been compiling most of that information himself since 1994, many of the past records from those years were already available, although there were many gaps that required further research. However in addition, there was no central place to find information about Green candidates before 1994, going back to 1985.

Between 2000 and 2002, Feinstein did an enormous amount of research to document these early candidacies. It involved reviewing numerous historical documents from the old GCoC, as well from the Green Party organizing committee of the early 1990s, as well as from individual state Green parties and Green locals. It also involved phone calls to dozens of present and formerly involved Greens, as well as to election officials across the country, from state offices down to small towns and villages. As a result of that cumulative research, a historical record listing most known Greens who ran for office since 1985 was completed in the data base ,and made available for public use.

Between 2002 and 2004, at the instigation of Feinstein and **Juscha Robinson** (WI), who was Co-chair of the GPUS Coordinated Campaign Committee (CCC) at the time, official control of the data base was gradually transferred from Feinstein to the CCC (Feinstein stayed on to help input and manage the data), while at the same time the CCC implemented the state. A few years after that, GPUS Political Director/Executive Director **Brent McMillan** became involved in gathering the data and ultimately assumed full administrative control and responsibility for maintaining the data base.

During this time, in response to a dispute between the GPUS Steering Committee and Feinstein/Markle about whether the GPUS would pay Markle for her initial work in designing the data base — as promised year before by the then GPUS Communications Committee — the GPUS instead took all the data out of the original data base and imported it into an entirely new data base designed by Pennsylvania Green **Matt Cleveland**.

Unfortunately some data and capabilities were lost in the transition to the new elections data base (originally established at www.gp.org/elections/candidates/index.php and currently at <https://secure.gpus.org/secure/testdb/>). Part of the goal of this upgrade is to regain those lost capabilities, as well as expand to new ones.

Recommendations:

1) The appearance and functionality of the Elections Data Base Home Page should be redesigned.

To find Green election results on www.gp.org, one has to take too many steps to get information about elections from a web site of a national political party.

One must first go to the top pull down menu and select Elections, then underneath, choose 'Election Data Base' and arrive at this link <https://secure.gpus.org/secure/testdb/>. At that point, there should be all kinds of interesting information available. *Instead there is nothing — other than an embarrassing disclaimer taking up most of the page, stating that our information is likely incorrect and incomplete!* To actually get any information, one must then engage a series of pull-down menus on the left-hand sidebar - and even then, find only limited information.

The data base home page should be redesigned to feature important information upfront - like the original site designed by Feinstein/Markle. That site included up-to-date results from the current year - nationally and by state, with links to each candidate, and a summary of with how many victories to date. It was also be easy to find results from other years from that same home page, without having to navigate a series of additional pull-down menus.

The original Feinstein/Markle design presented all this information in an extremely effective manner. Please review this archived copy, as a starting point <http://web.archive.org/web/20040703133324/greens.org/elections/> .

2) Fields in the Data Base

Many of these fields were in the original data base designed by Feinstein/Markle and carried over by Cleveland. The major changes recommended below are that some fields be redesigned so that they can generate more summaries of various types of information about our candidates.

Information Shown to the Public

- first name, last name of candidate
- name of office sought (with a pull-down menu created in the data base for each office - and with a numbering hierarchy for each type of office, from president and US Senate down to small local offices...see discussion below)
- district (with text field for name of district) or at-large
- city of office (text field)
- county of office (text field)
- state of office (pull-down menu)
- election date (in the original data base, this was done with a pull-down menu for each election date, but now is only a text field, this should be returned to a pull-down menu with the election dates recorded in the data base...see discussion below)
- whether it is a primary, general, special or other type of election (pull-down menu)
- number of seats (currently text field, consider pull-down menu)
- number of candidates (currently text field, consider pull-down menu)
- whether candidate is an incumbent (button)
- whether office is partisan (button)
- length of the term (this is critical!! see discussion in #5 below about officeholders)
- election results - fields for number of votes; percentage of vote (to two decimals), place of finish
- whether elected (button)

- link to candidate's campaign page
- link to official governmental page with elections results
- whether election is certified (button) each candidate page should also be set up as a template so that there is a photo for each candidate
- comment field for publicly disclosed information

Internal

- campaign contact information for each candidate (these fields are currently in the data base - Phone, Email; Campaign Address, Street / PO Box, City, State, Zip; Campaign Manager, Manager's Phone, Manager' Email Media Liaison, Media Liaison' Phone, Media Liaison')
- personal contact information for each candidate - phone, email, city, state (none of this is in the elections data base currently for candidates, so we lost ongoing contact with them if their campaign information goes dark)

The elections data base should be designed to allow these two sets of contact information (campaign and personal) to be exported for inclusion in the GPUS Nationbuilder CRM Data Base.

Internal/External

- gender of candidate (button)
- ethnicity of candidate (field or pull-down menu?)
- birthdate of candidate (should require xx-yy-zzzz format)
- age of candidate (generated from birthdate)
- comment field for internal information

On gender, ethnicity and age, even though this information should not be posted publicly with each individual candidate, the cumulative information should be available in search results. This would be a change from the current data base. For example, in the future we should be able to know the cumulative gender balance, ethnicity and/or age breakdown of our candidates in any election period, even if we don't label the gender along with each individual candidate's results.

3) Process for Data Entry By Authorized State Party Representatives

For several years in the early 2000s after the original Elections Data Base was created, many individual state parties designated representatives to post their state party's election information to the data base. In 2013 the SC authorized a password access program to give access to the data base on a state-by-state basis, to update the information for each state party and only that state party. This capacity needs to be provided for in the upgrade. This would make the Elections Data Base Coordinator's job much easier.

In addition there should be a general 'input' page to input data that would then be forwarded to the Elections Data Base Coordinator (Political Organizer), who could then choose to enter it into the data base after a quality control check. There was a page like that in the past, that gave individual Greens the opportunity to report candidate information. Here is a link to how that page appeared under the Feinstein/Markle design <https://web.archive.org/web/20020324041433/http://greens.org/elections/reportadditions.html>.

4) Displaying/Summarizing/Categorizing Green candidates

There are many creative ways in which the GPUS can display information about Green candidates, beyond simply displaying the overall number of how many Greens run and are elected. Below are some of the issues that this objective raises:

(4a) When the same type of office goes by different names, the data base needs to sync those offices together, so that searches and summaries are accurate for all of the same type of office. For example, all states (except Nebraska) have bi-cameral state legislatures. While most states refer to the upper house as the State Senate, the lower house goes by many different names - State Assembly, State House of Representatives, House of Delegates. This also happens with other types of offices, especially with school districts. It will take some work to sync these types of offices.

(4b) At the same time there should be a well-developed internal ranked hierarchy of the literally more than 100 different types of offices (including

those types that go by various names), from US Senate down to offices like library boards, that aids on how election data is presented.

The original data base had such a hierarchy. Apparently this concept was carried over to the current data base, but not well utilized. This capacity needs to be reviewed and implemented again, and with their governmental experience as current and past elected officials, Doonan and Feinstein as good ones to facilitate this process. Many of the levels are obvious - federal gov, state gov, county gov, city gov, college district, school district, special districts like water board, soil and conservation board., etc. Others less so.

(4c) Ultimately the data base should produce comparative summaries and charts demonstrating Green electoral performance over time, on a national basis and in different states.

Currently the GPCA produces a manually-created, static .html chart, that demonstrates what kind of information might be displayed on a year by year basis: <http://www.cagreens.org/elections/history-by-year>. Another example is from the original data base, featuring the results from a calendar year, with various categories summarized and linked to: https://web.archive.org/web/20011221232631fw_/http://www.raybold.com/kendra/gper/main.cfm.

As part of this process, page, the original data base allowed a resorting of election results by state, candidate, office, year, date. This capability needs to be brought back. By contrast, the current data base lists candidates alphabetically by first name only! The new data base should also have the flexibility to display candidates in ranked order by various other criteria, like the number and percentage of the vote, place of finish, etc.

The original data base had a place where an election date would be entered into the data base, in order to then appear on a pull-down menu of all election dates. That gave the data base the functionality to sort by election date. The current data base only has a text field for the election date, which then doesn't produce any calendar-driven sorting. The upgrade should return the previous pull-down menu functionality for listing election dates.

(4d) The data base should also provide the capability for its results pages to be embedded by state parties within their own state party sites, so that they can import/display the GPUS candidate and officeholder info for their state state in that manner. This would give each state party the ability on their own page to easily link to their own information stored in the Elections Data Base, and this would be a GPUS service of value to state parties that would give state party members a reason to donate to the GPUS.

(4e) Under GPUS Rules and Procedures Article VIII, the Apportionment Tabulation Committee (ATC) needs to calculate “The total number of votes for all Green Party state and local candidates during the previous four calendar years”; and each state party’s proportion of (i) Current Green Party elected officeholders and (ii) The total number of Green Party candidates for public office during the previous four calendar years. Currently this is done manually by spreadsheet. The Data Base should be upgraded to automatically perform and display these calculations.

(4f) The data base should also be designed so that election information can be exported in spreadsheet form.

(4g) Some of the lost data from the original data base was a web-based media library of thousands of articles about Green candidates and Green parties, linked to the election results where it references those candidates. In that way, media information about campaigns could be found easily when reviewing the link to each campaign in the elections data base. This capacity needs to be brought back. Here is an example of how the old site looked <https://web.archive.org/web/20071022063944/http://www.greens.org/media/>

(4h) Currently the data base does produce a summary results page for each candidate for each individual race, and then has links from that page to the other races that candidate may have run. This is useful for that year’s results. But we may want the data base to feature a separate summary home page for each person listed in the elections data base, that has their names, location, photo and links to all of their races and media links.

5) Automate Generation of Green Officeholders list/charts

Currently, the list of current Green officeholders is updated manually. It is inevitably almost always out of date and inaccurate <http://www.gp.org/officeholders>.

The data base should be able to mark candidates who are elected as officeholders; then automatically publish that information on an officeholder summary page, and be able to list of how many elected Greens we've had at any point in our history, on any particular date. The data base should also be able to display Green officeholders by type of office, state, gender.

This raises a design issue for generating the officeholders list from the data base - i.e. how do we enter 'start' and 'stop' dates for the terms of each officeholder? And what dates to we enter?

In terms of the starting date, there is either the date a person is elected, or the date they are sworn in and assume office. Most people don't get sworn in and assume the office until a few weeks (sometimes up to almost two months) after they are elected. This would be almost impossible to track given GPUS staff resources. It would also then not provide a clear indication of what changed on election day in terms of how many Greens would be serving in office going forward. Therefore for the purposes of simplicity and clarity, it's better to list people as starting to serve in office as of the election day, rather than trying to track their different swearing in dates. Then when someone is listed as elected, they are automatically included on the officeholders page as an officeholder as of that election date.

Based upon this approach, their 'stop' or 'ending' date (and their removal from the officeholders list) would be the next election for this office, whether in two or four years hence (or whatever the length of the term is for that office.)

How should this information be entered? This memo recommends a return to creating the election dates in the data base and being able to choose from them via a pull-down menu. With this in place, there would be a pull-

down menu for the 'start' date and a pull-down menu for the 'stop' date. Both would be drawn from a place in the data base listing all election dates - something that was in the original elections data base and abandoned in the current version.

Then is the question of listing the term length on the publicly visible page for each candidate. Currently there is a term length text field in the data base, where the length of the term for that office is manually entered in plain text, as 'four years' or '4 years'. This then shows up on the candidate results page. This raises this question: if the 'start' and 'stop' dates are generated from a pull-down menu, can the term length be generated by a comparison of the two dates? And would it be published in 'years', even though the pull-down menus compare two different dates?

This approach would work well for candidates who are elected and who serve full-terms. However there are two exceptions that need to be considered

First is the need to add Greens appointed to elected office to fill an unscheduled mid-term vacancy. Such individuals should be marked as an officeholder in the data base for the purposes of being included in the Green officeholders list, because the list is a list of Greens holding elected office, which includes Greens elected and appointed to the same office.

Second, there is the need to create an earlier 'stop' date, for when someone holding elected office resigns, dies, is recalled, moves out of the district, or otherwise leaves office before the scheduled end of the term, so that their name is removed from the officeholder list.

Perhaps an 'appointed date' and a 'left office early' option can be added to the data base to account for these possibilities.

6) Create Separate Page for Presidential Results

The Elections Data Base currently does not list Green presidential primary nor general election results. In fact, these results are nowhere to be systematically found on the GPUS site. The data base should be amended to contain and display all of the presidential information, with the total

number of votes and percentage of the vote for each state, and for the nation. It should also include links to the convention pages we have for each presidential year, and other presidential related material from our site.

7) 'Sidebar' links on Elections Data Base Home Page

In addition to pull-down menu search functions in the left hand sidebar, other GP election-related info should be found from the home page.

What we include can be open and creative. On this page <http://gpus.org/elections/> are archived Green election articles and analysis from the GPUS newspaper GreenPages, various state parties and other Green Party sources. When the data base home page is redesigned, it should make it easier there for people to learn anything they want about GPUS election history, including the various ways we've analyzed the the races ourselves.

Attachment: Selected views of old data base home page

2004 - <https://web.archive.org/web/20040703133324/greens.org/elections/>
2005 - <https://web.archive.org/web/20060405013814/greens.org/elections/>
2007 - <https://web.archive.org/web/20071221024326/greens.org/elections/>