

# Data Protection & Security

## Recommendations for staying within the law

The Liberal Democrats have a legal duty to keep voter data safe and secure.

The **Data Protection Act** classifies voting preference as “sensitive” along with things like medical records and sexuality.

The Information Commissioner is becoming increasingly strict about breaches in data protection and can impose a fine of up to £500,000.

To avoid breaking the law we need your help. Following the guidance set out in this *Geek Sheet* will ensure that you don't breach the user agreement you signed up to when you first logged into Connect.

### Exporting data

If you send unencrypted data to a direct mail company or other supplier and it is lost or stolen then **the party will be fined**.

Any function that *can* be carried out in Connect, *must* be done in Connect. **Exporting it without need or security is illegal.**

As such, only Connect Managers and their Deputies can export more than email addresses from Connect.

We need you to respect these restrictions and not attempt to circumvent them, in order that we can all stay within the law.

**Your help in this matter is greatly appreciated.**

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**Glasgow City Council fined £150,000 for loss of unencrypted laptops**

Glasgow City Council has been fined £150,000 for the loss of two unencrypted laptops, one of which contained personal details of more than 20,000 people.

The fine was issued by the Information Commissioner's Office.

## *Data Protection Best Practice*

**Data within Connect is very secure, but once it leaves Connect it becomes vulnerable to abuse. Following these basic steps can help to greatly reduce the risk.**

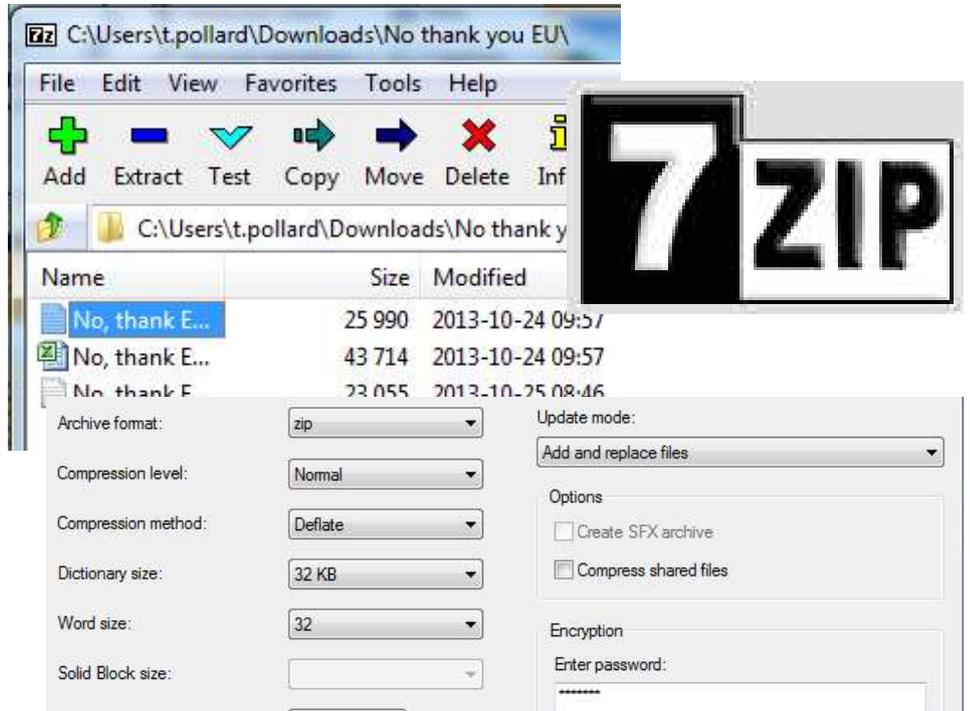
- Download free encryption software like **7-zip** (see overleaf) and use them to protect any files exported from Connect that contain personal data
- Do NOT send passwords that relate to encrypted files in the same email as the file. If possible send them by text
- Delete any export files immediately after use
- Routinely disable accounts for users who no longer require access (or put in an urgent support request to your Connect Manager or Regional Connect Manager if you're not able to do this yourself)
- Collect in all used and unused canvass cards and shred them before disposal
- Refer any requests from voters to have their data removed or sent to them (known as a Subject Access Request) to your Regional Connect Manager, via a support request

*Derived values (like target pool subgroup) and collated statistics (like exports from Counts and Crosstabs) are NOT considered personal data.*

# Recommended encryption software

After downloading personal data from Connect you **MUST** by law, encrypt the file before storing or sending it anywhere.

We recommend using **7-Zip**. It allows you to create a password protected zip file that can be opened by any other standard zipping program like Winzip. Download it for free from: [www.7-zip.org](http://www.7-zip.org)



## Email - Privacy & Electronic Communications Regulations

Bulk use of email addresses without permission is illegal. You need to make sure you have a robust system for keeping track of email opt-ins and opt-outs.

There are two options available in Connect.

### Single email list

If you only maintain one email list, then you can use the Email tags, which include Opt-In and Opt-Out options.

### Multiple email lists

If you have multiple email lists, you might want to create a local question that has multiple responses. You can then apply a response when someone opts in or out. However, you should only apply a response when actually contacted by a voter, as a false contact may prevent some Target Pools from functioning effectively.

## Email Collection Best Practice

### When and to what have people given consent?

- The wording below should be included at **any point** where an email address is collected - this gives implied consent
- All email contacts should include an **easy** way to opt-out
- If someone emails you, you have the right to email them back on related subjects, this is called a **soft opt-in**
- If someone emails your gov.uk or parliament.uk email address, consent has **only** been given to **you** as an elected representative, not the Liberal Democrats
- To get people to give consent to the Lib Dems, your MP / MEP / councillor emails should have links in to petitions and surveys that include the Lib Dem data protection wording

## Lib Dem Data Protection Wording

“ The Liberal Democrats and their elected representatives may use the information you've given to contact you. By providing your data to us, you are consenting to us making contact with you in the future by mail, email, telephone, text, website and apps, even though you may be registered with the Telephone Preference Service. You can always opt out of communications at any time by contacting us or visiting [www.libdems.org.uk/optout](http://www.libdems.org.uk/optout). For more information go to [www.libdems.org.uk/privacy](http://www.libdems.org.uk/privacy). ”

## Questions - Best Practice

Questions are used in Connect to record any opinion or preference expressed by a voter.

They can be used to record views on issues, likelihood to vote, willingness to sign a petition or volunteer, as well as voting intention.

### Recording contacts

When a question response is added in Connect it applies a contact to the voter. For that reason, you should not apply a question response to a voter unless someone has actually contacted them (or they have been in touch with us).

### Don't I need to use questions to record other information?

No, we can use tags to record information about a voter which is not related to their views.

You can also use Saved Lists to keep track of fixed groups of voters. Saved Lists can be added to and subtracted from each other in Create a List.

### How do I find the question I need?

Questions are sorted by "Cycle" and "Type". Cycle is the year of the *election* to which the question refers.

Type is whether the question is about a Party, a Candidate, an Issue, an Event, an Action (like putting up a poster) or volunteering. The Legacy type is for data that has been imported from past databases.

## The Data Journey



Canvasser collects question responses of:

**Usual Vote:**  
Conservative

**Local election vote:**  
Lib Dem

Data input into Connect



Canvass Analysis

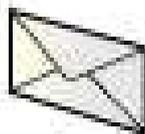
Blue Lib Dem

Voter's record has question and contact responses applied. Canvass analysis is calculated

Canvass Analysis puts the voter into **Switch** group of **Tory Facing** target pool

Master Party ID is the most recent future voting intention. In this case **Lib Dem**

Voter gets correct direct mail for those who float between us and our main opposition in Tory facing seat



Voter is added to Shuttleworth because we know they are voting **Lib Dem** this time



## To map or not to map...

You can search across many similar questions quickly by using a **Master Question**. Master Questions don't have a year associated with them and are found at the very bottom of the question list.

If you create a local question you need to put in a support request to get it mapped to a Master Question. That way, when you want to find all Liberal Democrats, for example, you don't need to look at all your questions one by one.

There are 9 master questions:

- **Master Party ID (MPID - future voting intentions)**
- **Past Party ID (PPID - past voting behaviour)**
- **2nd Preference Party (the voter's second choice)**
- **Volunteer (will they volunteer)**
- **Important Issues (what matters to them)**
- **Squeeze Master (for tactical voting questions)**
- **Posters (will they display a poster or garden poster)**
- **Scottish Independence**
- **EU Referendum**

Question subject	Example	Master Question	Canvass Analysis
On future voting intention	Which party will you vote for next time?	Master Party ID (MPID)	Yes
On past voting behaviour	Which party did you vote for last time?	Past Party ID (PPID)	Yes
On party views	Who do you usually support?	None	Yes
On a national issue	Is crime an important issue to you?	Important Issues	No
On a very localised issue	Are you in favour of controlled parking?	None	No
On posters	Would you be willing to display a poster?	Posters	Yes
On volunteering	Can you spare an hour a month to help us?	Volunteer	Yes

## Do's and Don'ts

**Do** put in a Support Request to get your local questions mapped to a master question and to canvass analysis.

**Don't** create questions for "Admin" purposes. Saved Lists do the job better and without creating false contacts.

**Do** check if there is a national question you can use before creating one of your own.

**Don't** blindly apply canvass data to questions that weren't asked on the doorstep.

**Do** archive old questions. You'll still be able to find them if you need them (via the option at the very bottom of the question list), but it will keep your lists tidy.

**Don't** have only one voter ID question in your script. This makes it much less likely that the voter will end up in the correct Canvass Analysis category.

**Do** explain to your canvassers what happens to their data after they give it to you, and why it's essential that they ask all the questions in the script.

# Target Pools and why we use them

Target Pools are searches that the national Connect team have created to help you quickly select groups of voters.

## Target Pools can be found in:

- Create a List
- Counts and Crosstabs
- The Question and Contact Summary pages
- Export files

## Target Pools allow you to:

- Quickly create lists of voters
- Create split mailings (either internally within Connect or using Word)
- Look at complex statistics (e.g. Switch analysis)

*“Will target pools work for me?”*

Target Pools work best when there is data in the system for them to feed off.

## Marked Registers

It is important that you get the records from the council about who voted, so that we can start to treat people differently based on their past voting record.

## Using multiple questions

When you record answers to more than one voting intention question for each voter, it helps Connect to know which voters are floating between which parties.

Target Pools

Include people in **ANY** of the following:

- Doorstep Canvass : Tier One
- Doorstep Canvass : Tier Two
- Volunteer Prospects : Tier One
- Volunteer Prospects : Tier Two
- Volunteer Prospects : Tier Three
- Volunteer Prospects : Tier Four
- Volunteer Prospects : Tier Five
- Register History : 18 by May 2014
- Register History : 18 by May 2013
- Register History : 18 by May 2012
- Register History : 18 by May 2011
- Register History : Voted in recent local elections
- Register History : Voted in recent national election ONLY
- Register History : Voted but not recently
- Register History : New for 2014
- Register History : New for 2013
- Register History : New for 2012
- Register History : New for 2011
- Register History : No Record of Ever Voting
- Tory facing : Supporters
- Tory facing : Switch
- Tory facing : Squeeze
- Tory facing : Stay at home
- Tory facing : Unknowns
- Labour facing : Supporters
- Labour facing : Switch
- Labour facing : Squeeze
- Labour facing : Stay at home
- Labour facing : Unknowns

*Create quick lists of priority voters based on marked register and past canvass data*

*Target your recruitment at the hottest prospects based on how recently and frequently we've spoken to them and how positive their Lib Dem canvass was*

*Work to engage first time voters*

*Who is most likely to vote in your election?*

*Voters new on the register who've not yet voted locally need to know that we're active locally and have a chance of winning here!*

*Target your messages to make sure you're motivating your supporters, winning over floating voters, squeezing the third party and demotivating the main opposition.*

*Choose from Tory and Labour facing versions depending on who is your main opposition.*

## *Key facts about Target Pools*

- Target Pools update **overnight** to reflect the data entered into Connect the previous day
- Each Target Pool consists of one or more **sub-groups**
- Each voter can only appear in **ONE** of the sub-groups of a Target Pool.
- If a voter fulfils the criteria for more than one sub-group, they will appear in the sub-group that is **HIGHER** up the list

## Target Pools & direct mail

You can send different letters to different target pool sub-groups and still print them out in delivery walk order.

**Letters to My List**

Template Letter: (Branch By Target) \*  
 Target Pool: Tory facing

1) When printing letters, choose "Branch By Target" from the Template Letter drop down.

2) Then choose the target pool you want to use.

3) Finally, assign a letter text to each sub-group.

**Letter Batch Wizard**  
 Step 2 of 3 - Assign Form Letters to People by Target Sub-Groups

Tory facing	Count	Template Letter
Supporters	144	Issue : Million Jobs Campaign - Supporters (all seats)
Switch	16	Issue : Million Jobs Campaign - Tory Facing Areas - Switch group
Squeeze	86	Issue : Million Jobs Campaign - Tory Facing Areas - Labour Squeeze
Stay at home	32	
Unknowns	722	

Alternatively, if you prefer to do your mailmerge in Word, you can include the Target Pools as a column in your export file.

A 3 letter abbreviation indicates which sub-group each voter appears in.

D	E	M
Tory_facing	Labour_facing	M
Unk	Unk	L
Squ	Sta	L
Unk	Unk	L
Swi	Squ	C

## Target Pools & statistics

Target Pools can also be found in Counts and Crosstabs to allow detailed statistical analysis.

A target pool with Switch Analysis in its name will tell you what canvass analysis or voting intention we had for a voter in the past. For example **MPID 2016 for Switch Analysis**, will give you the Master Party ID response during the 2016 election campaign.

This allows you to compare your recent data with the information we had then. So, you can answer questions like "Are our supporters still with us?", "Are we squeezing the third party?", "Is the opposition vote hardening?" and "Are we winning over floating voters?"

CA Group July 2016 for Switch Analysis

Canvass Analysis July 2016 for Switch Analysis

- ..... MPID 2012 for Switch Analysis
- ..... MPID 2013 for Switch Analysis
- ..... MPID 2014 for Switch Analysis
- ..... MPID 2015 for Switch Analysis
- ..... MPID 2016 for Switch Analysis

### Target Pool access

Available to everyone:

**Letters** - bulk apply the Letters tags to voters to create your own tailor made segmentation for direct mail

**Doorstep canvass** - allows you to leave out voters who don't vote or have already made up their mind

**Volunteer prospects** - uses contact history to prioritise recruitment by recency, frequency and support

**Register History** - marked registers separate voters by how often they vote or when they appeared on the register

**Tory / Labour facing (Eng & Wal)** - segments voters into the 4 "S" groups by Canvass Analysis to target messages

**Scottish Direct Mail (Scot)** - for targeted messages based on likelihood to support SNP

**Lifestage** - separate your messages by the likely age and family status of the voter.

**EU Referendum** - uses question responses and demographics to determine likely attitude to Brexit

**GOTV Shuttleworth** - Tory, Labour and Scottish lists of who best to remind to vote.

Available on request:

**Multi-party facing** - the 4 S groups split out to allow for smaller parties. Put in a support request for access.

# Who is in each target pool?

Remember that no voter can appear in more than one sub-group of the same target pool.

Target Pool	Includes	Excludes	Notes
<b>Doorstep Canvass (Tier 1)</b>	<ul style="list-style-type: none"> <li>Voted in the last 5 years</li> <li>New on the register in the last 3 years</li> <li>Turned 18 in the last 5 years</li> <li>Past supporters</li> <li>Likely Remain voters</li> </ul>	<ul style="list-style-type: none"> <li>Households of 10 or more</li> <li>Doorstep canvassed in the last 100 days</li> <li>Phone canvassed in the last 14 days</li> <li>Strong Lib Dems</li> <li>Repeatedly canvassed as opposition</li> <li>Not Voting and Not Lib Dem since the general election</li> <li>Tagged as opposition activists, religious non-voters etc.</li> <li>Data Plus "Stay at Home" groups</li> <li>Likely Leave voters</li> </ul>	<ul style="list-style-type: none"> <li>Not householded</li> <li>Hugely benefits from the addition of marked registers</li> <li>More targeted with Data Plus</li> </ul>
<b>Doorstep Canvass (Tier 2)</b>	<ul style="list-style-type: none"> <li>Ever voted</li> <li>New on the register in the last 5 years</li> <li>Switch voters with no record of ever voting</li> <li>Strong Lib Dems</li> <li>Data Plus "Switch" groups</li> </ul>	<ul style="list-style-type: none"> <li>Households of 10 or more</li> <li>Doorstep canvassed in the last 100 days</li> <li>Phone canvassed in the last 14 days</li> <li>Tagged as opposition activists, religious non-voters etc.</li> </ul>	<ul style="list-style-type: none"> <li>Not householded</li> <li>Expanded with Data Plus</li> </ul>
<b>Volunteer Prospects (Tier 1)</b>	<ul style="list-style-type: none"> <li>Canvassed as Definite Lib Dem in the last 100 days, and contacted at least 4 times prior to that</li> </ul>	<ul style="list-style-type: none"> <li>Tagged as Age:Infirm</li> </ul>	<ul style="list-style-type: none"> <li>If nobody in Tier 1, move on to Tier 2, then Tier 3 etc.</li> </ul>
<b>Volunteer Prospects (Tiers 2 to 5)</b>	<ul style="list-style-type: none"> <li>Each tier gradually relaxes the restrictions on frequency and recency of contact, as well as strength of support.</li> </ul>	<ul style="list-style-type: none"> <li>Tagged as Age:Infirm</li> </ul>	<ul style="list-style-type: none"> <li>Includes existing volunteers. If required, remove them using the My Campaign tab in Create a List.</li> </ul>

Target Pool	Includes	Excludes	Notes
<b>Register History</b> (18 by May 201X)	<ul style="list-style-type: none"> <li>Turned 18 in the 12 months leading up to the May elections in the year concerned</li> </ul>	<ul style="list-style-type: none"> <li>Nobody</li> </ul>	<ul style="list-style-type: none"> <li>Even 18 year olds who have voted in an election will be in these groups</li> </ul>
<b>Register History</b> (Voted in Recent Local Election)	<ul style="list-style-type: none"> <li>Voted in a low turnout election in the last 5 years, including police commissioner, European and byelections</li> <li>All current postal voters</li> </ul>	<ul style="list-style-type: none"> <li>Turned 18 in the last 5 years</li> </ul>	<ul style="list-style-type: none"> <li>Relies on local volunteers entering the marked registers</li> </ul>
<b>Register History</b> (Voted in Recent National Election ONLY)	<ul style="list-style-type: none"> <li>Voted in a high turnout election in the last 5 years, including general election, Scottish Parliament and Welsh Assembly</li> </ul>	<ul style="list-style-type: none"> <li>Turned 18 in the last 5 years</li> <li>Voted in recent local election</li> <li>Postal voters</li> </ul>	<ul style="list-style-type: none"> <li>Relies on local volunteers entering the marked registers</li> <li>Good group to target for postal votes</li> </ul>
<b>Register History</b> (Voted, but not recently)	<ul style="list-style-type: none"> <li>Anyone with marked register data from 5+ years ago</li> </ul>	<ul style="list-style-type: none"> <li>Recent voters</li> <li>Postal voters</li> </ul>	<ul style="list-style-type: none"> <li>Only worth targeting if recent marked register data is incomplete</li> </ul>
<b>Register History</b> (New for 201X)	<ul style="list-style-type: none"> <li>Joined the electoral register in the 12 months leading up to the May elections in the year concerned</li> </ul>	<ul style="list-style-type: none"> <li>Anyone with marked register data</li> <li>Postal voters</li> <li>Joined as an 18 year old</li> </ul>	<ul style="list-style-type: none"> <li>To be targeted or ignored depending on the turnover of new residents locally. Can vary between 5 and 50% a year!</li> </ul>
<b>Life Stage</b> (In Student Accom)	<ul style="list-style-type: none"> <li>In a property coded as Student</li> </ul>		<ul style="list-style-type: none"> <li>Refers to codes in the Property Database</li> </ul>
<b>Life Stage</b> (In Elderly Accom)	<ul style="list-style-type: none"> <li>In a property coded as Elderly</li> </ul>		<ul style="list-style-type: none"> <li>Refers to codes in the Property Database</li> </ul>
<b>Life Stage</b> (HMOs)	<ul style="list-style-type: none"> <li>Four or more surnames in the house</li> <li>Three or more surnames in walks coded as HMO</li> </ul>	<ul style="list-style-type: none"> <li>Student Halls and Elderly Homes</li> </ul>	<ul style="list-style-type: none"> <li>Refers to codes applied in Walk Manager</li> </ul>
<b>Life Stage</b> (Likely Parent)	<ul style="list-style-type: none"> <li>Demographically likely to be a parent</li> </ul>		<ul style="list-style-type: none"> <li>Add a Lifestage tag to add or remove people</li> </ul>
<b>Life Stage</b> (Other under 35s)	<ul style="list-style-type: none"> <li>Aged under 35 according to their date of birth</li> </ul>		<ul style="list-style-type: none"> <li>Add a Lifestage tag to add or remove people</li> </ul>
<b>Life Stage</b> (Parents: Adult kids at home)	<ul style="list-style-type: none"> <li>Older people who share a house with younger people of the same surname</li> </ul>		<ul style="list-style-type: none"> <li>Add a Lifestage tag to add or remove people</li> </ul>
<b>Life Stage</b> (Middle age)	<ul style="list-style-type: none"> <li>Aged between 35 and 59 according to date of birth</li> </ul>		<ul style="list-style-type: none"> <li>Add a Lifestage tag to add or remove people</li> </ul>
<b>Life Stage</b> (Aged 60+)	<ul style="list-style-type: none"> <li>Aged 60 and above according to date of birth</li> </ul>		<ul style="list-style-type: none"> <li>Add a Lifestage tag to add or remove people</li> </ul>
<b>Life Stage</b> (Probably younger)	<ul style="list-style-type: none"> <li>Have a name that makes them more likely to be young</li> </ul>	<ul style="list-style-type: none"> <li>People of known age</li> </ul>	
<b>Life Stage</b> (Probably older)	<ul style="list-style-type: none"> <li>Have a name that makes them more likely to be older</li> </ul>	<ul style="list-style-type: none"> <li>People of known age</li> </ul>	

Target Pool	Includes	Excludes	Notes
<b>EU Referendum</b> (Leans Remain)	<ul style="list-style-type: none"> <li>Has been canvassed as Remain or demographically likely to be Remain</li> </ul>	<ul style="list-style-type: none"> <li>Canvassed as Leave</li> <li>EU Nationals</li> </ul>	<ul style="list-style-type: none"> <li>Modelled Remain voters should be 2:1 against Brexit</li> </ul>
<b>EU Referendum</b> (Leans Leave)	<ul style="list-style-type: none"> <li>Has been canvassed as Leave or is likely to be Leave based on demographics</li> </ul>	<ul style="list-style-type: none"> <li>Canvassed as Remain</li> <li>EU Nationals</li> </ul>	<ul style="list-style-type: none"> <li>Modelled Leave voters should be 2:1 in favour of Brexit</li> </ul>
<b>EU Referendum</b> (Undecided)	<ul style="list-style-type: none"> <li>Has been canvassed as Undecided or whose demographics do not suggest strong support for either side</li> </ul>	<ul style="list-style-type: none"> <li>Canvassed as Leave or Remain</li> <li>EU Nationals</li> </ul>	<ul style="list-style-type: none"> <li>Asking about Europe will move them into the groups above</li> </ul>
<b>EU Referendum</b> (EU Nationals)	<ul style="list-style-type: none"> <li>Could not vote in referendum due to EU citizenship</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Worth targeting for local elections about their right to stay</li> </ul>
<b>Labour / Tory Facing</b> (Supporter)	<ul style="list-style-type: none"> <li>Strong Lib Dem, Lib Dem, Weak Lib Dem</li> </ul>	<ul style="list-style-type: none"> <li>Not Lib Dem and Not Voting with no marked register data</li> <li>UKIP in Wales &amp; Scotland (as no Nationalist points applied)</li> </ul>	<ul style="list-style-type: none"> <li>Voters remain in this group until canvassed for another party. Not Lib Dems are still targeted as historic supporters</li> </ul>
<b>Labour / Tory Facing</b> (Switch over Europe)	<ul style="list-style-type: none"> <li>Probably or definitely Remain voters, in the canvass analysis categories of your main opponent</li> <li>Demographically likely to be both Remain and supporters of your main opponent</li> </ul>	<ul style="list-style-type: none"> <li>Canvassed as Consider Lib Dem: No, Not Voting or Not Lib Dem since Referendum</li> </ul>	<ul style="list-style-type: none"> <li>Switch voters for whom Europe could be a key issue</li> </ul>
<b>Labour / Tory Facing</b> (Switch)	<ul style="list-style-type: none"> <li>Other voters with party points for both the Lib Dems and our main opponents</li> <li>Anti-Corbyn Labour voters (Labour Facing only)</li> </ul>		<ul style="list-style-type: none"> <li>For targetting on issues other than Europe</li> <li>Green voters treated as Labour</li> </ul>
<b>Labour / Tory Facing</b> (Squeeze)	<ul style="list-style-type: none"> <li>Voters in canvass analysis categories other than those of our main opponents</li> </ul>		<ul style="list-style-type: none"> <li>For targetting tactical voting messages</li> </ul>
<b>Labour / Tory Facing</b> (Stay at Home)	<ul style="list-style-type: none"> <li>Other voters in canvass analysis categories of our main opponents</li> </ul>		<ul style="list-style-type: none"> <li>For avoiding</li> </ul>
<b>Labour / Tory Facing</b> (Supporter+)	<ul style="list-style-type: none"> <li>Demographically likely to be Lib Dem</li> </ul>		<ul style="list-style-type: none"> <li>Limited to areas that bought Data+</li> </ul>
<b>Labour / Tory Facing</b> (Switch+)	<ul style="list-style-type: none"> <li>Demographically likely to support our main opposition, but be open to our messages</li> </ul>		<ul style="list-style-type: none"> <li>Limited to areas that bought Data+</li> </ul>
<b>Labour / Tory Facing</b> (Squeeze+)	<ul style="list-style-type: none"> <li>Demographically likely to support the third party</li> </ul>		<ul style="list-style-type: none"> <li>Limited to areas that bought Data+</li> </ul>
<b>Labour / Tory Facing</b> (Stay at Home+)	<ul style="list-style-type: none"> <li>Demographically likely to support our main opposition</li> </ul>		<ul style="list-style-type: none"> <li>Limited to areas that bought Data+</li> </ul>

# “Are we winning?”

## Creating and interpreting switch analysis

Switch Analysis is the comparison of current voting intentions with past data, to work out how voters are “switching” between parties.

It can be used to answer questions like:

- Are our past voters sticking with us?
- Are we squeezing the third party?
- Are we winning over floating voters?
- Who has the momentum?

### Will it work for me?

Switch analysis relies on having a reasonable amount of both current data (from this campaign) and past data (from a previous campaign or non-election canvassing). To provide a decent comparison, at least a few hundred voters need to have been canvassed twice - before and after the cut off date, when the data was frozen.

### What data can I compare?

We take a snap shot of the data after every election.

The standard switch analysis compares with canvass analysis at the beginning of the current campaign, or voting intentions collected at the election four years ago (since most election cycles are four years in length).

## Running Switch Analysis



A switch analysis takes just seconds to create using **Run Counts & Crosstabs with Format**, which can be found in My List or in the Report Manager. Select the Canvass Analysis, General or Local election format as appropriate and choose **My List** or one of your pre-prepared **Saved Lists or Searches**.

Run Counts and Crosstabs

Format: 2013 Local Election MPID Switch An  
Add New Format  
Title: My List 2013 Local Election MPID Switc

## Preparing your data



Question: 2015 Party: GE canvass (Eng)  
Responses:  Definite Lib Dem  
 Probable Lib Dem  
 Conservative  
 Soft Conservative  
 Labour  
 Soft Labour  
 Not Lib Dem  
Input Type: [ ] Contact Type: [ ]  
Canvassed By: [ ]  
Entered By: [ ]  
Canvassed from: 1/1/2014 To: [ ]  
Date Entered From: [ ] To: [ ]  
Entered: [ ] days ago

### SEARCH STEP ONE:

Create a list of everyone who has given any answer to the canvass question you have used most.

The preset Switch Analysis in Connect looks at Master Party ID. If you've been using more than one question that maps to MPID, e.g. asking about the local and general election, then Connect will choose the most pessimistic response.

Set the “Canvassed From” date to the start of your campaign, or 1st July, whichever is most recent.

### SEARCH STEP TWO:

Add a step to your search using the **Contact Status** tab.

Add everyone who has **Refused** to answer questions on the Doorstep, from the same date as in step one.

We don't include “Refused”s from phoning because they tend to be misleadingly high.

Select **\*National\*** as your party organisation.

Contact Status  
Include Only: people based on the following contact results:  
 Call Back  
 Call Blocked  
 Canvassed  
 Come Back  
 Deceased  
 Do Not Doorstep  
 Do Not Mail  
 Do Not Phone  
 Election Comm.  
 Engaged  
 Hand Delivered  
 Inaccessible  
 Left Message  
 Posted  
 Moved  
 Non-Citizen  
 Not Home  
 Refused  
 Unknown  
Input Type: [ ]  
Contact Type: Doorstep Any Pass  
Canvassed By: [ ]  
Date From: 1/1/2014 To: [ ]  
Entered by: [ ]  
Date Entered From: [ ] To: [ ]  
Canvassed in the past: [ ] Days  
Party Organisation: \*NATIONAL\*

**NOW: Save this search for regular use throughout the campaign**

## Things to look for...

The Switch Analysis output shows the various canvass analysis categories (either grouped or in full) down the left hand side, as they were on the most recent cut off date. The current voting intention is across the top, and only includes people canvassed since the most recent cut off date.

My PDF Files	2
Counts/Crosstabs Outputs	38
Follow Up Calls	1

You will find your Switch Analysis under **Counts and Crosstabs Outputs**, available from the top left portion of the Main Screen.

CA Group July 2016 for Switch Analysis	Lib Dem Def		Lib Dem Prob		Conservative		Labour		Nationalist		Green		Independent		Not Lib Dem		Not Voting		Refused		Unknown		Total People
	%		%		%		%		%		%		%		%		%		%		%		
Lib Dem Group	48	11.29	66	15.53	27	6.35	73	17.18	25	5.88	1	0.24	4	0.96	48	11.29	18	4.24	27	6.35	88	20.71	425
Conservative Group	1	2.56	5	12.82	9	23.08	7	17.95	3	7.69	0	0.00	0	0.00	5	12.82	1	2.56	1	2.56	7	17.95	39
Labour Group	15	11.72	18	14.06	5	3.91	31	24.22	8	6.25	1	0.78	1	0.78	11	8.59	9	7.03	11	8.59	18	14.06	128
Nationalist Group	0	0.00	0	0.00	0	0.00	1	100.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	1
Unaligned and No Data Group	379	8.00	502	10.60	258	5.45	985	20.80	353	7.46	14	0.30	12	0.25	658	13.90	333	7.03	96	6.25	945	19.96	4,735
Total People	443	8.31	591	11.09	297	5.61	1,097	23.59	389	7.30	16	0.30	17	0.32	722	13.55	361	6.78	335	6.29	1,058	19.86	5,328

What proportion of the opposition groups are voting Lib Dem?

What is the balance of our Supporters between Definite and Probable Lib Dems?

Where are the peaks in the opposition vote?

Where are our dissatisfied Supporters going?

**Lib Dem Group:** To get a better result than last time we need a high retention rate of supporters, and would expect a two thirds / one third split of definites to probables. We can only afford to lose a handful of voters to other parties. High numbers of Not Lib Dem, Not Voting or Refused in this group should ring alarm bells.

**Third & Fourth Parties (Squeeze):** If we are not converting more than half of these to definite Lib Dems, then more targeted persuasion work is needed to improve our position on the last election. A large number of Not Lib Dem, Refused or Won't Say (shown here as Unknown) could indicate a hardening of the opposition support.

**Main Opposition:** The importance of this group will depend on whether you have enough Supporters and Squeeze voters identified to win. If you're relying on converting Switch voters, then you will need to look at the full break down of canvass analysis categories to see which we are winning and which we are losing.

## Further analysis in Excel...

Any output can be exported or shared with other users within Connect. You can also generate a link which will allow people without a Connect user account to access the report online without logging in.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
1	Canvass Analysis July 2016 for Switch Analysis	Lib Dem Def	%	Lib Dem Prob	%	Conservative	%	Labour	%	Nationalist	%	Green	%	Independent	%	Not Lib Dem	%	Not Voting	%	Refused	%	Unknown	%	Total People
3	Strong Lib Dem	9	9.3	11	25.58	1	2.33	6	13.95	1	2.33	0	0	1	2.33	3	6.98	0	0	0	0	16	37.21	43
4	Lib Dem	8	9.52	13	20.63	0	0	7	11.11	3	4.76	0	0	0	0	5	7.94	3	4.76	2	3.17	24	38.1	63
5	Weak Lib Dem	6	10.14	36	10.14	24	6.76	55	15.49	18	5.07	1	0.28	3	0.85	39	10.99	15	4.23	19	5.35	109	30.7	355
6	Blue Lib Dem	0	0	1	9.09	1	9.09	0	0	1	9.09	0	0	0	0	0	0	0	0	2	18.18	6	54.55	11
7	Red Lib Dem	2	6.25	4	12.5	1	3.13	5	15.63	3	9.38	0	0	0	0	3	9.38	0	0	4	12.5	10	31.25	32
8	Green Lib Dem	0	0	1	50	0	0	1	50	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2
9	Con	0	0	1	16.67	4	66.67	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	6
10	Weak Con	1	3.03	2	6.06	3	9.09	7	21.21	3	9.09	0	0	0	0	0	0	0	0	0	0	0	0	33
11	Yellow Con	0	0	1	20	2	40	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	5
12	Red Con	0	0	1	33.33	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3
13	Lab	0	11.11	1	11.11	0	0	4	44.44	0	0	0	0	0	0	0	0	0	0	0	0	0	0	9
14	Weak Lab	11	9.65	16	14.04	4	3.57	13	21.93	3	2.63	0	0	0	0	0	0	0	0	0	0	0	0	114
15	Yellow Lab	3	3.33	1	4.35	1	4.35	3	13.04	3	13.04	1	4.35	0	0	0	0	0	0	0	0	0	0	23
16	Bl	0	0	0	0	0	0	2	66.67	0	0	0	0	0	0	0	0	0	0	0	0	1	33.33	3

Project the Lib Dem vote by multiplying the current numbers in various canvass analysis categories by the percentage that are definite Lib Dems.

Calculate your winning post as expected turnout x electorate x 0.5

Using conditional formatting in Excel can help to highlight peaks and troughs in the data.

Sampling of the different canvass analysis categories can help you decide if a ward is safe, needs extra resources or is a lost cause. It can also tell you which voters need targeting with more leaflets or contact. But you need to be careful if your sample is biased by other vital targeted campaigning or if the numbers are too small to draw any safe conclusions.

# Statistical rules of thumb

Using the combination of the switch analysis and a simple breakdown of your current 4S groups, it is possible to calculate a number of indicators that predict your likelihood of victory.

The table below shows a Red / Amber / Green rating for each of six easily calculated values. The definitions of the values in each column is shown overleaf.

**RED** - indicates a value that suggests less than a one in three chance of winning a ward

**AMBER** - indicates a roughly 50:50 chance of winning a ward

**GREEN** - indicates more than a two in three chance of winning a ward

Taken together you can use them to judge how winnable an

individual ward is and prioritise your wards against each other.

Resources can then be moved from wards with a very low or high chance of winning into those which are more marginal.

You should always keep monitoring the stats week to week throughout the campaign, even in relatively safe wards, to prevent any nasty surprises.

Size of Shuttle as a % of vote target	D:P Ratio	% Defs in the Lib Dem groups	% Defs in the Switch canvass analysis categories	% Defs in Squeeze groups	4S formula as a % of vote target
<125%	<1	<50%	<20%	<20%	<75%
125% - 175%	1 - 2	50% - 60%	20% - 30%	20% - 30%	75% - 125%
175%+	2+	70%+	30%+	30%+	125%+

*For full definitions, turn the page*

# Definitions of your key stats

## Size of Shuttleworth as a % of vote target:-

For statistical purposes we will define your Shuttleworth as your Supporter group plus your Squeeze group.

Your vote target is your electorate, multiplied by the expected % turnout, multiplied by % of vote you think you need to win (half in a 2 cornered contest or less if you expect a significant third or fourth party vote).

E.g. 
$$\frac{\text{Supporters + Squeeze}}{\text{Electorate x Turnout x Winning \%}} \times 100\% = \frac{3133 + 1246}{7528 \times 0.65 \times 0.4} = 224\%$$

Supporters	3,133
Switch	940
Squeeze	1,246
Stay at home	517
Unknowns	1,692
	7,528

## Ratio of Definites to Probables:-

Use the definite and probable Lib Dems collected using your main canvass question to calculate a simple ratio:

E.g. 
$$\frac{\text{No. Of Definite Lib Dems}}{\text{No. Of Probable Lib Dems}} = \frac{443}{591} = 0.75$$

CA Group July 2016 for Switch Analysis	Lib Dem Def	%	Lib Dem Prob	%
Lib Dem Group	48	11.29	66	15.53
Conservative Group	1	2.56	5	12.82
Labour Group	15	11.72	18	14.06
Nationalist Group	0	0.00	0	0.00
Unaligned and No Data Group	379	8.00	502	10.60
<b>Total People</b>	<b>443</b>	<b>8.31</b>	<b>591</b>	<b>11.09</b>

## % of Definites in your canvass analysis groups:-

Use your switch analysis to find these figures already calculated, in this case 11%, 3% and 12% respectively.

CA Group July 2016 for Switch Analysis	Lib Dem Def	%	Lib Dem Prob	%
Lib Dem Group	48	11.29	66	15.53
Conservative Group	1	2.56	5	12.82
Labour Group	15	11.72	18	14.06
Nationalist Group	0	0.00	0	0.00
Unaligned and No Data Group	379	8.00	502	10.60
<b>Total People</b>	<b>443</b>	<b>8.31</b>	<b>591</b>	<b>11.09</b>

## 4S formula as a % of vote target:-

Compare a projected Lib Dem vote, based on the findings of your switch analysis, with the number of votes you need to win.

Projected Lib Dem vote =

- Def Lib Dems in Lib Dem group (%) x No. of Lib Dems
- + Def Lib Dems in third party group (%) x No. of third party
- + Def LDs in the Yellow main opposition CA category (%) x No. In the Yellow category

E.g. 
$$\begin{aligned} & 56\% \times 3133 \\ & + 40\% \times 940 \\ & + 50\% \times 1246 \\ & \hline & \mathbf{2754} \end{aligned}$$

Vote target = electorate x turnout x % needed to win = 7528 x 0.65 x 0.4 = 1957

Projected Lib Dem vote as a % of vote target = 
$$\frac{2754}{1957} = 141\%$$

# Introducing “Data Plus” to Target Pools

**Data Plus is a way of segmenting voters for whom we have little or no canvass data.**

It is used in many of the preset target pools which we create nationally. They include the term (Plus) in their name or in the name of their sub-groups.

## What is Data Plus?

We have taken your canvass data and compared it with a variety of demographic data. From that we can make an educated guess about which of the 4 S groups they might otherwise fall into.

## Does this mean I don't need to go canvassing?

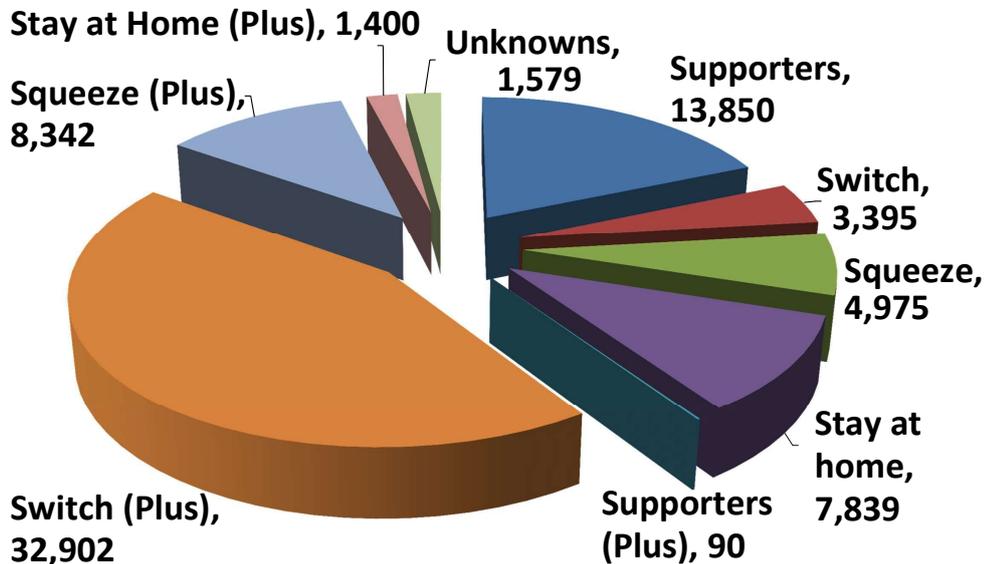
No! If you don't speak to these people, they're not going to vote for you, but what it does mean is that you can spend your time talking to the people who are going to be most receptive to your message, and you can send the right squeeze and switch messages to the right people.

## Where can I find Data Plus?

Data Plus is incorporated into the “Four S” target pools giving you an extra four categories of:

- Supporters (Plus)
- Switch (Plus)
- Squeeze (Plus)
- Stay at Home (Plus)

for people on whom we have no, or little, other data.



Above is an example of how a typical constituency breaks down into the Four “S” groups with Data Plus. Using this data you can:

1. *Easily segment your mailings between Supporters, Switch and Squeeze even before canvassing them*
2. *Plot voters on a map to find the best areas for more leaflets*
3. *Work out where to start when breaking new ground in “blackhole” areas*

**The Doorstep Canvass (Plus) target pool also allows you to miss out the houses that contain voters unlikely to support us or unlikely to vote.**

- *Tier One* of Doorstep Canvass (Plus) uses your canvass data and marked registers to find the high priority voters and excludes those that Data Plus says are least likely to support us
- *Tier Two* uses Data Plus and other information to give you the best other voters to talk to if you are short of people in Tier One. It is most useful if your marked register data is incomplete.

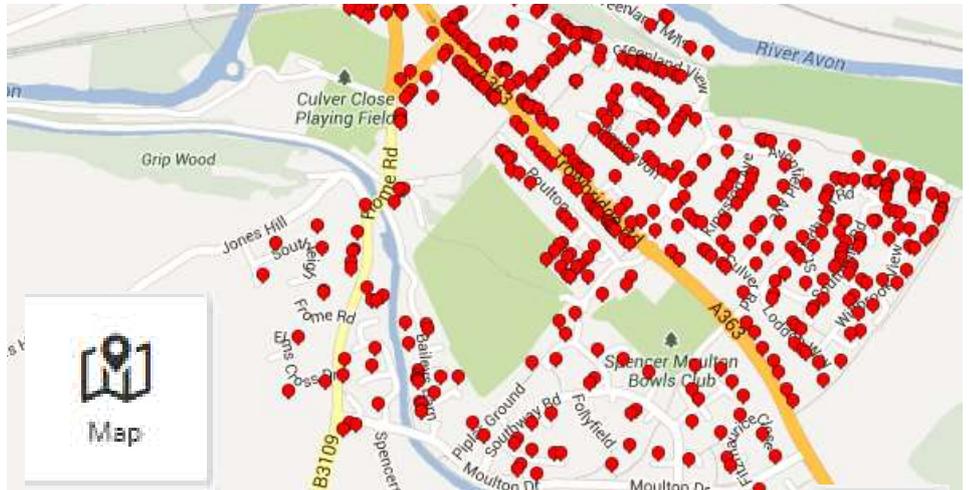
## *How do I get Data Plus?*

- All held seats and those on the Strategic Seat programme get this data for free. Some Euro campaigns also paid for all the data in their region.
- Other seats may get the opportunity to buy into Data Plus again at some point - keep an eye out for more information.

# Using Data Plus in practice

In the Target Pools tab of Create a List you can find the regular 4 S groups, as well as the 4 S (Plus) groups in Labour and Tory facing versions.

Use this along with other target pools like Register History, to come up with your mailing list and segment it to send targeted messages to supporters, squeeze voters and those considering the main opposition.



Use Maps and Counts and Crosstabs to analyse where your supporter, switch and squeeze groups live to decide where to go canvassing or to deliver additional literature.



Tory facing																	
Supporters	%	Switch	%	Squeeze	%	Stay at home	%	Supporters+	%	Switch+	%	Squeeze+	%	Stay at Home+	%	Unknowns	%
659	13.75	101	2.11	107	2.23	440	9.18	112	2.34	2,828	59.00	346	7.22	56	1.17	144	3.00
659	13.75	101	2.11	107	2.23	440	9.18	112	2.34	2,828	59.00	346	7.22	56	1.17	144	3.00

Use the Doorstep Canvass (Plus) target pool in Create a List to draw up a canvass list of people worth speaking to.

Add a Householding step to make it "all in house" if you prefer.

**Householding** Pool: Tory facing

- Script Options
- Choose a Script for everyone in the List
  - Choose a Default Script and up to 4 alternate Scripts
  - Choose a Default Script and alternate Scripts based on Target's Subgroups

Script: 2016 National Canvass Script (Eng)

- MiniVAN
- MiniVAN Formats
- MiniVAN Campaigns

Alternate Script: 2016 National Volunteer Recruitment: Short version

when subgroup = Supporters



MiniVAN Campaigns allow you to use different scripts for each of the four S groups (see right).

## Nationalists, UKIP & the Green Party

**There are separate target pools with expanded Four S groups to include the SNP, Plaid Cymru, UKIP and the Green Party.**

The **Scottish Direct Mail** target pool is automatically available to everyone in Scotland.

This uses data plus as well as independence referendum voting intentions to categorise people more effectively.

The **Multi-party facing** target pool is available on request. Please put in a Support Request within Connect and we can give your local party access.

It allows you to send separate switch messages to soft Nationalist, Green Party and UKIP supporters so that you don't unwittingly drive them towards your opposition by treating them as squeeze voters.

# Data Sharing - who can see what

Connect is built around a structure of Party Organisations, sometimes called by their American name of Committees.

Party Organisations are groups of people who need to share data. They can be a local party, a regional party or the office of an MP, MEP or councillor.

Party Organisations are often named after geographical areas, but they don't have to be. For example, Liberal Youth and the party phone banks also have party organisations.

## What are party organisations for?

They are partly to provide a firewall for data protection purposes, so that private casework data is not shared with those that don't need to know it.

They also help to keep the system neat and tidy, so that we all don't have to wade through the thousands of questions and scripts created by every other user in the country.

## Is that the only thing that affects data sharing?

No, different types of data are shared in different ways. In addition, your user profile determines the level of access you have to different types of data.

This Geek Sheet should help you understand more about how this sharing works.

## How do I go about sharing?

As a user, you can share many things that you create in Connect with others. This includes questions, scripts, forms, folders (and the lists and searches in them), letter templates and virtual phone banks.

Any screens where you create any of the above will have one or more boxes at the bottom. You can use them to share your work with one or more of the following:

- Individual users in your party organisation
- Individual users in other party organisations of which you are a member
- Everyone in your party organisation, or other party organisations of which you are a member
- User groups in your party organisation
- My Voters and / or My Campaign
- Real and Training mode

The screenshot shows three sections of the 'Party Organisation Access' interface:

- Party Organisation Access:** A table with two columns: 'Party Organisations with Access' and 'Party Organisations without Access'. The 'with Access' list includes Brecon and Radnorshire, Cardiff, Carmarthen West and South Pembrokeshire, Ceredigion, Liberal Democrats (highlighted), Montgomeryshire, Newport, North Wales, and Preseli Pembrokeshire. The 'without Access' list includes Wokingham, Wolverhampton South West, Worcester, Wycombe, Wyre and Preston North, Wyre Forest, Yeovil, York Central, York Outer, and Yorkshire and the Humber Region. 'Remove' and 'Add' buttons are at the bottom.
- Voter File Access:** A table with two columns: 'Databases with Access' (containing 'Real Mode') and 'Databases without Access' (containing 'Training Mode'). 'Remove' and 'Add' buttons are at the bottom.
- My Campaign Access:** A table with two columns: 'Databases with Access' (containing 'Real Mode') and 'Databases without Access' (containing 'Training Mode'). 'Remove' and 'Add' buttons are at the bottom.

# Data Sharing - quick guide

	Shared with...	Shared by...	Visible to...	Also searchable by...
<b>Contact details, personal stats, suppressions, voting history, canvass analysis and postal vote status</b>	All - including between My Voters and My Campaign (where relevant)	Connect - automatically	All local users	Connect Managers and Deputies on a read-only basis nationwide using Quick Look Up only
<b>Questions</b>	The Party Organisation in which it was created	Senior Activists and above, with other Party Organisations of which they are a member	Local users in the Party Organisations with which it is shared	Any user, IF the question is mapped to a master question
<b>Contact History</b>	The Party Organisation of the person who input the data (including via a VPB)	The *National* Party Organisation	All users in the Party Organisation of origin	Senior Activists and above using the *National* results group (found at the top of the Party Organisation drop down menu)
<b>Tags</b>	All (with some local exceptions)	Lib Dem HQ	All (with some local exceptions)	All (with some local exceptions)
<b>Membership information</b>	All (in My Voters) and inserted into local Party Organisation in My Campaign	Lib Dem HQ from the MDO (every month or so)	Senior Activists and above	
<b>Notes</b>	The Party Organisation of the person who input the data (including via a VPB)	Not sharable, can be transferred on request	Users in the Party Organisation of origin	

## Sharing via User Groups

User Groups are a quick and easy way of sharing things like Virtual Phone Banks with the same group of people again and again.

You can create a new user group by following the User Group link and Add New User Group button from the left hand side of the main screen of Connect.

You can then add your users to these groups - either one at a time in their user profile (see below), or in bulk, using the **Quick Actions** drop down menu on the Users page.



## Am I knocking up the right people?

Just because it's polling day, doesn't mean we shouldn't ask which way people are voting. Even on the day we can use this information to help us win.

The standard national polling day scripts include a question asking which way people are going to vote.

By entering that data, we can compare the responses for different groups, in order to decide whether our knock up is being effective.

### What do I do with the data once I've got it?

Every voter has a *Canvass Analysis* which summarises their past canvass data. For example "Weak Lib Dem" or "Yellow Conservative". Normally this changes as soon as we enter more data, but on polling day in major elections it remains frozen.

So, if we find the Red Lib Dems are not voting for us, we can stop reminding them to vote.

### Where can I compare my new data with my old data?

In *Counts and Crosstabs* you can compare any two data sets. Choose your polling day voting intention question in *Crosstab 1* and *Canvass Analysis* in *Column 1* and hit Refresh.

If more people are voting for our main opponent than us, or we're getting such a low return on the group it's not worth our time, then consider dropping them.

Select the question you are using in your polling day script.

Select Canvass Analysis and tick the Show Percentages box.

Canvass Analysis	Definite		Probable		Labour		Labour		Conserva
	Lib Dem	%	Lib Dem	%	Labour	%	Labour	%	
Blue Lib Dem	42	68.85	4	6.56	0	0.00	0	0.00	
Green Lib Dem	3	50.00	1	16.67	0	0.00	0	0.00	
Lib Dem	77	69.37	13	11.71	0	0.00	0	0.00	
Red Lib Dem	34	58.62	8	13.79	3	5.17	3	5.17	
Strong Lib Dem	144	86.23	15	8.98	0	0.00	0	0.00	
Weak Lib Dem	10	16.95	8	13.56	0	0.00	0	0.00	
Yellow Conservative									

Compare the percentage of each group who are saying Definitely or Probably Lib Dem. Here the Weak Lib Dems are under performing. We're knocking up more people who are voting against us than are voting for us. We should change the Shuttleworth (knock up list) to exclude the Weak Lib Dems from now on.

Above is an example screen from *Counts and Crosstabs*.

To make it easier to read you can make a list of people who have answered the question in *My List* first, and then run this report just for that list.

You can look at all of your data or break it down by ward, to

compare how things are going in different places. In a local election, this may also inform a decision to concentrate on those wards that are looking most marginal.

At the election we will create a *Counts and Crosstabs Format* that you can run for use with the national questions.

## Are my supporters turning out to vote?

**Telling Data Report**

Vote Type: Polling Day | Format: Percentages only | Ward: [dropdown]

Get Out The Vote:  Get Out The Vote

Enter Telling Data | View Stats

Included: [dropdown] | Local Authority: Richmond upon Thames | Westminster: [dropdown]

Break vote totals down by: **Canvass Analysis** | Parties: [dropdown]

Remember Me | Clear | Refresh

You can choose to look at raw numbers or percentages. You can break down stats by ward and polling district.

You can compare turnout between any groups or saved lists you like. We recommend the simplest option of Canvass Analysis, i.e. turnout by party.

Lib Dems often win elections by differential turnout. That means that we get more of our supporters out to vote than the opposition do of theirs.

This page lets you set up your report and export it (you'll need to hit Refresh first). Experiment with the options before polling day and save your settings with the Remember Me button.

You can then move resources to the polling districts where our vote is staying at home. This will help us achieve a differential turnout with our opposition.

If we are entering telling data, we can track turnout in Connect using the View Stats link under the Get Out the Vote tab.

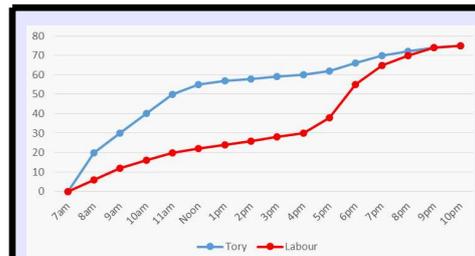
Below is an example export file. You can use it to see where your vote is and isn't turning out.

The difference between our turnout and theirs is known as "The Premium" and should be as large as possible.

	A	B	C	D	E	F	G	H	I
1	County Council	County Electoral Division	Voted in District	Conservative Voted (%)	Conservative Voted (%)	Labour Voted (%)	Labour Voted (%)	Liberal Democrat	Liberal Democrat
2	Cumbria	Cartmel ED	16%	14%	21%	11%	1%	21%	67%
3	Cumbria	Grange ED	0%	0%	0%	0%	0%	0%	0%
4	Cumbria	High Furness ED	0%	0%	0%	0%	0%	0%	0%
5	Cumbria	Kendal Castle ED	9%	10%	12%	7%	3%	12%	70%
6	Cumbria	Kendal Highgate ED	9%	13%	9%	14%	9%	12%	58%
7	Cumbria	Kendal Northern ED	8%	10%	10%	7%	2%	10%	73%
8	Cumbria	Lower Kentdale ED	11%	13%	36%	10%	2%	12%	48%

This column shows the turnout amongst all voters.

Each party has a column to show what percentage of their supporters have voted (D,F & H), and a column to show what percentage of the people who've voted are canvassed as that party (E,G & I). If our turnout is ahead, the numbers in our first column will be larger than those in the opposition first column.



The graph above shows how Tories tend to vote early and Labour after work. Keep this in mind when comparing opposition turnout to your own.

## Things to think about

- Turnout patterns vary depending on demographics. For example, older people will vote early, young parents at school closing time, commuters in the evening etc.
- Typically we'll be behind and catch up in Conservative areas. In Labour areas we'll be ahead early and lose ground later.
- If you have not done a polling day in your seat before, talk to a local about what to expect and factor it in to your thinking.

# Connect Guide to Register Updates

The electoral roll is your list of voters in Connect - found under the My Voters tab.

*Where does it come from?*

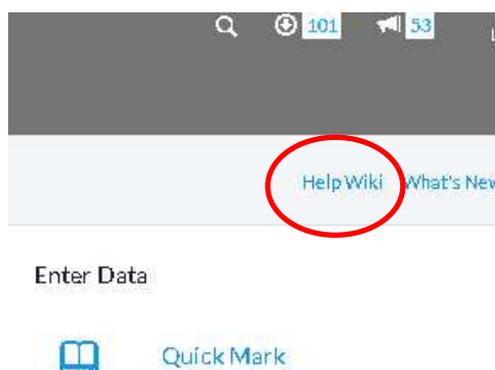
Your local authority collates the list in the Autumn and usually publishes it on December 1st.

Updates of additions and deletions are available on the first of every month from January until September. Additional updates are also done immediately before elections.

Lib Dem HQ contact the council on your behalf and obtain this data as quickly as possible. It is uploaded into Connect once a month, usually on the second Tuesday.

*How up to date is it?*

You can see when the most recent update for your council was added to Connect by looking in the "Help Wiki", in the top right of the Connect homepage.



*What can I do to help?*

If you are keen to ensure that the register gets updated at the earliest opportunity, then your local DNO can also request the file from your council and upload it to the LDHQ server using our secure link.

Visit [data.libdems.org.uk](http://data.libdems.org.uk) for more information.

## What to do AFTER a register update...

When new voters appear on the electoral roll, there are a couple of things you need to do to ensure they appear in your delivery walks and canvass lists in the correct place.

1) In *Walk Manager*, go into each polling district in turn, click on *Edit All Walks*, allow the map to load, check that no dots are unallocated and then click *Save And Finish*.



2) If you have sorted your streets, then click on the *Streets Sorted* link by each polling district and see if the status of any streets have changed from *Sorted* to *In Progress*. New properties will be added at the end of each street, so move them into place and alter the status to *Sorted* before saving.

Streets Sorted (% Streets)	Sort Status
19/28 (68%)	Sorted
1/1 (100%)	In Progress
1/1 (100%)	Sorted

## What if I have boundary changes?

**If your local council is going to change the ward or polling district boundaries, then they will probably republish the entire register. When this happens, you may lose your walk data in *Walk Manager*. Some users may also lose their Connect access.**

Your walks will only disappear if the names the council uses for each polling district change.

Sometimes this may just happen to a limited number of them, but if you're unlucky it could apply to the entire local authority area.

To make the process of recutting your walks quicker, you should create PDFs of your walk sheets **before** the register update so that you have something to refer back to.

This can be done in *Walk Manager*, using the *Print All Cover Sheets* option next to each polling district name.

[Print All Cover Sheets](#)

The cover sheets will appear on the *My PDF Files* page, accessible via the top left hand side of the Connect home page.

[My Export Files](#)

[My PDF Files](#)

### User access

Users whose access rights have been assigned by ward or by polling district will lose that access if the names of the ward or polling district change.

Your Connect Manager will need to assign the new names to them using the *Assign People* link on the user's record.

Local Authority East Dunbartonshire  
Polling District EC50, EC51, EC52, EC53, EC54, EC55, EC56, EC57, EC58, ES50, ES51, ES52, ES54, ES55, ES56, ES57, ES58, ES59, ES60, ES62, ES63, ES64, ES65, ES66, ES67, ES68, ES70, ES71, ES72, ES73, ES74, ES75, ES76

[Assign People](#) [Exclude People](#)

# Postal voters

Currently LDHQ do NOT collect postal voter files from Councils on a regular basis.

As such, it is up to you to request them as and when you want them, and to load them into Connect via Bulk Upload.

*Before you upload a new file*

Information about who has a postal vote is held in the **Ballot Type** field in Connect. When you want to update this information, you will need to request that the old data be removed - this is not something you can do yourself.

To request the Ballot Type field be cleared, please complete the online form at:

[libdems.org.uk/clear-my-pvs](http://libdems.org.uk/clear-my-pvs)

Apply Postal / Proxy Vote Data

<input type="radio"/> Choose Column from Data File	<input type="text"/>
Form Sent to Council <input checked="" type="radio"/> Apply One Value to All Records	<input type="text" value="ddddd/mm/mm"/>
<input type="radio"/> Choose Column from Data File	<input type="text"/>
Voted on Election Day <input checked="" type="radio"/> Apply One Value to All Records	<input type="text" value="ddddd/mm/mm"/>
<input type="radio"/> Choose Column from Data File	<input type="text"/>
Ballot Type Name <input checked="" type="radio"/> Apply One Value to All Records	<input type="text" value="Postal"/>

As well as uploading new postal voters into Connect using Bulk Upload, you can also upload your data file as a **Saved List** at the same time. This is a good way of keeping track of who has gained a postal vote and who has lost one. You can then take action if some of your supporters have not renewed their postal votes.

Save as Saved List

For more information on Bulk Upload see Quick Sheet section 5.5

List Name	<input type="text" value="Postal voters 22nd April"/>
Description	<input type="text"/>
Folder	<input type="text" value="Postal voters"/>

# Tracking people who move house

LDHQ run a matching program roughly once a year to track voters who have moved house.

This takes place around February, after the process of updating all new registers has been finished.

Voters who have been tracked with a high level of probability have their previous record fully merged into their new one.

*Lower probability matches*

Other voters whose match is probable, but less certain, will have a small number of party points applied to put them in the correct **Canvass Analysis** group without any specific contacts or questions being applied.

This process may mean that their record appears blank even though they have a canvass analysis category assigned. This is normal and no reason to be concerned, but please put in a Support Request if you have any questions about specific voters.

## Accessing old registers and poll numbers

**There are two places in Connect where you can access information about previous registers.**

The first is in the Poll Number Log of each voter record, where you can see their previous polling numbers, the local authority they were from and the date on which that poll number was replaced with a new one. The main reason for this record is to assist with the legal reporting of political donations for which the poll number at the time of the donation is required.

Polling Number Log		
Polling Number	Local Authority	Valid Until
AD674/3	Hart	15/12/15

**The second place, is the Marked Register Export feature, which allows you to download a complete file of how the register looked (in Connect) on a particular date, going back two years.**

This feature allows you to upload data on who voted in a past election even after the poll numbers change. It can be found under the Advanced Menu in the bottom left corner of the main Connect screen. See Quick Sheet section 5.6 for more information.

