

## 1. Ensure all Lighthouse data is in My Campaign.

This is best done by the MDO for the whole party even for the largest parties. IME less than 2% of members have an issue.

### Check Local Party v Local Area

As reports will be run by users on geographical lines it is worth checking to ensure these are all shown correctly in Connect.

Go into My Campaign, Create a New List

Select LP boundary (Westminster or Local Authorities), Membership Information, Member Current and remove all suppressions.

Edit search, remove people, select Membership Information, Member Current and your local party, remove suppressions.

If people remain it's because they are members with an address within your local area, but registered with the National party as being members elsewhere.

This can be because

1. They have ties to another local party and wish to remain with them. This is usually legitimate
2. They have moved, their address has been changed locally on Connect but not on Lighthouse. As they are usually not available in your lighthouse you will need to email [membership@libdems.org.uk](mailto:membership@libdems.org.uk) for this to be corrected by HQ
3. They have moved and address/LP updated in LH but address change has not been correctly reflected in MC - when confirmed you can update MC address
4. Their LP in Connect is blank - this needs to be reported to [membership@libdems.org.uk](mailto:membership@libdems.org.uk) for correction of historic bug

Go into My Campaign, Create a New List

Select Membership Information, Member Current and your local party and remove all suppressions.

Edit search, remove people, select your LP boundary (Westminster or Local Authorities), remove suppressions

If people remain it's because they are members in your Local Party, but do not have an address within your local area.

This can be because

1. They have moved out but wish to remain as your members (this is common with uni students) and they can be left (though I would always make a note on their record so in future people know why there is a discrepancy)
2. They are duplicate records in MC and need to be merged with the correct record (there was a flurry of duplicates created over a few days in early 2020)
3. Their address or Districting information is blank in MC - often because LH flow went wrong - you can often resolve by finding the MV record and copying the address from there to MC, sometimes their real address has been marked as bad within Addresses (restore in View Address History)

Fixing obvious issues found in these two lists will give you a cleaner set of data in My campaign that can then be compared to the accurate membership records in Lighthouse.

## **Check My Campaign Local Party v Lighthouse**

Export list of members for the entire party from Lighthouse

Go into My Campaign, Create a New List

Select Membership Information, Member Current and your local party and remove all suppressions.

Export this list into excel and do a manual reconciliation to ensure all members are in My Campaign. (You can do this by sorting both excel lists of names into the same order, then using an IF function to check that they are the same. Or add a column in which you concatenate Postcode and Last name for each list, and use a VLOOKUP function to copy across the first name to check. Other methods for comparing 2 lists in excel are available)

Reasons they may be missing: If any members do not match on this list, attempt to find them using quick look up.

If you find the member in My Campaign in Connect but they not appearing on your list:

Did you remember to remove suppressions (rerun your list)

Is my activist ticked (tick it)

Some of the discrepancies may be caused by incorrect geography issues as above - escalate to [membership@libdems.org.uk](mailto:membership@libdems.org.uk) if you cannot resolve.

Other common issues which require escalation and fixing by HQ

1. An address has been changed in LH and whilst the change has flowed to Connect, the corresponding change in LP has not
4. The MC record has a blank local party
5. A Connect MC record is inexplicably linked to the MV record of a different person, or contains address and other details of another member - this is part of the Shellstrop event of November 2018. HQ think they have found and fixed all of these errors but the occasional one snuck through
6. The Connect record shows status (current/lapsed) incorrectly
7. An address has been correctly changed in Connect to bring a member into your local area, but LH does not reflect the address change and so you are not able to see the member in your records

Issues which can be fixed manually by you in Connect/Lighthouse

1. Connect has multiple records for the same person - you can use "merge duplicate" to create one record.
8. An address has been correctly changed in LH and the change has not flowed to Connect
9. An address has been correctly changed in Connect and the change has not flowed to LH

There can also be instances where the Connect address is blank as we are aware that the member has moved from the address in LH, but not where they have gone to. These should be marked as "not at this address" in LH and effort made to get them to contact HQ to amend their address

For all the above issues it is helpful if clear and consistent notes are made in Connect MC so that time is not wasted investigating the same thing by multiple people and future enquirers are aware of the status of the discrepancy

**At this point your My Campaign Data should be an accurate reflection of your Local Party membership. However not all the people within My Campaign will be matched to a record on the electoral register in My Voters. When these details are matched, questions responses and other information (not email addresses or notes) are automatically shared between the two databases in an overnight process.**

## **2. Check My Voters v. My Campaign**

This can initially be done for an entire local party - experience shows approximately 85% of records accurately match. The investigations are best done by people who know the membership though, so it can be delegated down to a branch, division or ward level. The reconciliation should be done for an entire LP area, but it can be useful to first concentrate on Members, then Supporters, then others.

Although Connect tries to match members in “My Campaign” with voters in “My Voters”, there are many reasons why members showing in “My Campaign” are not matched to the electoral register in “My Voters” and each person needs to be investigated - this is where local knowledge comes in handy. You may also need to contact members to clarify details.

### **2.1 Find “My Campaign” records with missing “My Voter” records**

Check that you are in the correct local party organisation.

Go into My Campaign, select “Create a New List”

Select “Membership Information”, set “Member status” = “Current” and choose your Local party

Select “Voter File Record” and set to “No Voter File Record”

Select “Suppressions” and click on “Remove All Suppressions”.

Run the search. This will create a list of people who are not currently matched to the electoral register. You may wish to save this search, as it is one that will need to be run periodically.

Click on each name to go into their record.

Select “VANID” and “Search Voter File”. This will search the “My Voter” database for people with the same name. If the person has a common name you may wish to limit the search to your local area. If no search results are returned, you will need to search by other criteria. If an email address is given try to search on that, otherwise use address or postcode.

The most frequent reasons that a member is not linked to a record in “My Voters” are:

1. People giving slightly different names when registering as members to those used on the electoral register, e.g a member doesn't include a middle initial or uses a middle name on their membership form. Also, sometimes surnames will be different because of married/ maiden names.
10. People using nicknames. The automatch system should take into account common nicknames (e.g. Tim and Timothy, Katherine and Cathy), but there will always be some that it doesn't.

11. The My Campaign record has been created before the Voter file record (for instance when someone joins the party before their registration to vote is reflected in the electoral register update) in which case the automatch process cannot run.

In these cases the correct records can be linked by selecting the button next to the correct name and address and clicking on "link this voter" in the "control panel". Occasionally mismatches in the data will cause the system to ask you to merge two "My Campaign" records and to choose which you want to be the primary record - always select the oldest record as the primary, but also select the most correct address/name if they differ.

There are some cases where a member cannot be matched with their electoral roll record and local knowledge can help or investigation is needed to find the cause of the discrepancy

1. The member is deceased and no longer on the electoral register, but the membership details have not been updated. Please be aware of this possibility if contacting members that you cannot find in My Voters. If you do find deceased members you should mark this on Lighthouse, record under "Vital Stats and Contact Preferences" in the "My Campaign" record and click "Remove from My Activists" in the "Actions" tab. Please also ensure their email address is removed from any bulk emailing system you use.
12. A member is under 18 or is ineligible to vote due to nationality and therefore simply doesn't appear on the electoral register. In the case of under 18's please make a note of when they turn 18 so that the records can be matched in the future.
1. A member has moved and so disappeared from the electoral register, but their membership records have not yet been updated in LH or Connect. Contact needs to be made with the member to check their new address and Lighthouse and Connect should be updated with the new information and matched where possible

This should leave you with a list in My Campaign which contains every member within your local party area, and with every one of those members who is eligible to vote matched to all the information we know about them in "My Voters". All you have to do now is contact them all and get them involved in your campaigning!