

Every night Salesforce feeds “My Campaign” with membership data. Connect then tries to match members in “My Campaign” with voters in “My Voters”. Occasionally things don’t work 100%, so there are two things that you need to do to help the process.

1. Ensure all members are in My Campaign.

This is best done by the MDO for the whole party even for the largest parties. In my experience, fewer than 1% of members are not shown correctly in My Campaign.

1.1 Check My Campaign Local Party v Salesforce

Firstly, export a list of members for the entire Party Organisation (“PO”) from Salesforce.

Secondly, in Connect, make sure that you are signed into the relevant Party Organisation.

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

- Select “Membership Information” and set “Member status” = “Current” (you may not have access to this field, if not talk to your connect manager - you need to be a Senior Activist at least) and your local party; and
- Select “Suppressions” and click on “Remove All Suppressions”.

Run search and then export this list into excel and do a manual reconciliation to ensure all members in Salesforce are also in My Campaign. (You can do this simply by sorting both excel lists of names into the same order, then using an IF function to check that they are the same, or using the spreadsheet compare tools - other methods are available)

Reasons members may be missing in My Campaign

If any members do not match on this list, attempt to find them in My Campaign using quick look up. If they are in My Campaign in Connect, but not appearing on your list:

- Did you remember to remove suppressions ? If not, remove and rerun your list.
- Is there a button marked “Add to My Activists” in the Actions section ? If so, click it.
- Are they marked as members and in the correct local party (this cannot be changed locally so please put in a Support Request with the person’s details)

If they cannot be found in My Campaign at all, then please escalate via a support request.

1.2 Check Local Party (“LP”) v Local Area

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

Whether your Party Organisation is aligned to a Westminster constituency or local authority will determine the local area that you should check against.

a) Find members of your local party not resident in your local area

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

- Select Membership Information, set “Member status” = “Current” and select your local party; and
- Select “Suppressions” and click on “Remove All Suppressions”.

Run Search, then select “Edit search”, “Remove People”:

- Select “District” and your relevant LP boundary (Westminster or Local Authorities); and
- Select “Suppressions” and click on “Remove All Suppressions”.

Run Search.

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

Sometimes this is legitimate because they have moved out of the LP area, but wish to remain as your member (this is common with students) and they can be left (though always make a note on their record so in future people know why there is a discrepancy)

Sometimes it is because of issues with the data in Connect - check that their real address has not been marked as bad within Addresses, View Address History and if it has and you know they are still resident, restore it.

b) Find members in your local area, but not in your local party

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

- Select “District” and your relevant LP boundary (Westminster or Local Authorities);
- Select Membership Information, set “Member status” = “Current”; and
- Select “Suppressions”, click on “Remove All Suppressions”.

Run Search, then select “Edit search”, “Remove people”,

- Select Membership Information, set “Member status” = “Current” and select your local party; and
- Select “Suppressions”, click on “Remove All Suppressions”.

Run search. 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.

Sometimes this is legitimate because they have ties to another local party and wish to remain with them. Sometimes it’s because they have moved and failed to inform HQ. If you contact them and this is the case you can email help@libdems.org.uk to have their address changed on Salesforce and you have a new member! (Please do not change addresses on Salesforce yourself - there is a bug that means that entries by local parties do not cause the LP field to be updated, it is on the list to be fixed).

If there are party members on the electoral register (i.e. in My Voters) who have mistakenly not been marked as “your activists”, they will not show up in your My Campaign database, so there is one additional check to do.

Go into My Voters, select “Create a New List”:

- Select “District” and your LP boundary (Westminster or Local Authorities);
- Select Membership Information, set “Member status” = “Current”; and
- Select “Suppressions”, click on “Remove All Suppressions”.

Run Search, then select “Edit search”, “Remove People”:

- select Membership Information, set “Member status” = “Current” and select your local party
- Select “Suppressions”, click on “Remove All Suppressions”.

Run search. 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 and not marked as your activists.

Again sometimes this is legitimate because they have ties to another local party and wish to remain with them. If this is the case they should still be marked as your activists as they may still be willing to be involved with your local party as well. To rectify this:

- Select “Voter File VANID” click on the blue number next to VAN ID - this takes you into their My Campaign record.
- Select “Actions”, click on “Add to My Activists”. It is advisable to note the Local party discrepancy in the notes field

Sometimes it’s because they have moved and failed to inform HQ. If you contact them and this is the case you can email help@libdems.org.uk to have their address changed on Salesforce and you have a new member! (Please do not change addresses on Salesforce yourself - there is a bug that means that entries by local parties do not cause the LP field to be updated, it will be fixed soon).

There may be some people still missed by this process, as not all members in My Campaign are matched with a MyVoters record, but it’ll be as close as you can get.

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. The next section explains how to ensure that members in My Campaign are matched to a record in My Campaign, as far as is possible.

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.

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.

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

- a) 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.
- b) 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. If you do find nicknames that have not been matched please email regnierwilson@mac.com and I will get them added to the list of common nicknames.
- c) 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.
- d) Sadly, the member is deceased, 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 Salesforce, 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.

These situations can all be resolved as detailed below. There are some situations where there can legitimately be no “My Voter” record and in these cases a note should be made on the system to note the discrepancy for other users.

- e) A member has moved and is no longer on the electoral register, but has not yet provided an updated membership address. Contact should be made where possible, address details updated in Salesforce by emailing help@libdems.org.uk. If the move is within your area you should set a reminder to yourself to update the match when the next electoral register update reflects their new location. If out of the area, make a note to ensure you chase in a few weeks if they have not updated their details and dropped off your lists.
- f) 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.

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 “Districts” and the geographical area you want to check (LP(s) or ward(s)/division(s));
- Select “Membership Information”, set “Member status” = “Current” (do not select your Local Party as you will wish to ensure people who live in your area but are members of other parties are still correctly matched to an electoral roll record)
- Select “Voter File Record” and set to “No Voter File Record”; and
- 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 the name to go into the 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
- If you find a voter file record which obviously matches the member but has not out-matched for reason a-c above you should click/select the button next to the correct name and address and then click 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 you find other’s with the same surname at that address, find that email record at a different address or can’t find them at all, please investigate by contacting the member (or delegating contact to someone else) and ensure clarifying notes are entered on their “My Campaign” record to explain the lack of an entry on the electoral roll.

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!

3. Running reports

You can obviously write your own reports on your members in My Campaign, but there will be a national template each year that contains basic information. It shows contact details, the last answer to a voting intention question, the last answer to the master Volunteer and Poster questions and their answers to those questions for this cycle. The report will be named 20XX Activist Information.

You can also run lists of all members within “My Campaign” and send these to Minivan or VPB’s to enable Doorstep or phone contact by you or other local activists. You can write your local scripts or use the National script which should contain all the questions you need. This script will be available each cycle as 20XX Member/supporter activation