ORGANIZING FOR ACTION

One-on-One Data Entry

A huge part of the success of Organizing for Action is our ability to build relationships, and holding meetings person-to-person is a key part of starting and sustaining those relationships.

The 1:1 meetings are tracked using the survey question **2013 Action: 1-on-1 Meeting**, which has the following responses available:

Prior to the meeting:

Scheduled – marked when a person wants to meet and a date/location are set for the meeting

Need to Schedule – marked when a person wants to meet but needs a call to set up the details

Declined – marked when a person no longer wants to meet or declines the initial ask

When the meeting takes place:
Intro Attended – first meeting with the person, laying out mission of OFA, getting buy-in

Maint Attended – regular meeting with engaged individuals to keep strong ties to team

Escal Attended – meeting to bring the person up the ladder of engagement in leadership tags

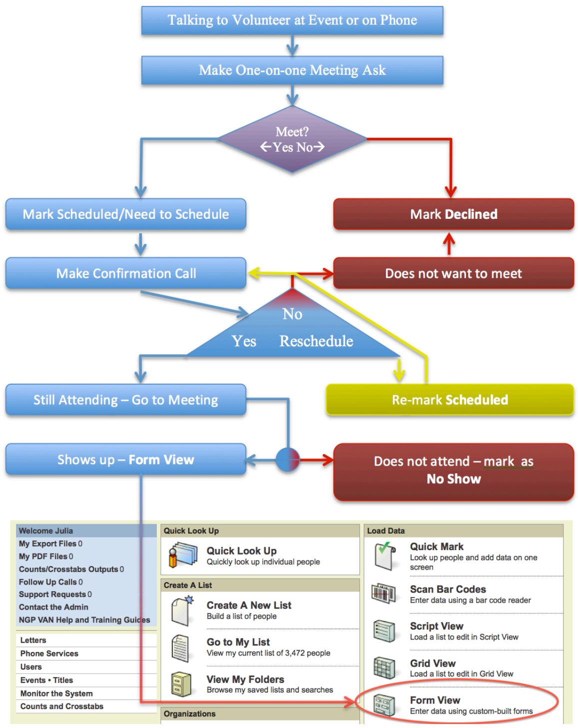
Confirmation Attend – meeting to confirm the person to a chapter/team leadership role

No Show – the person does not notify you ahead of time and do not attend the meeting

ORGANIZING FOR **ACTION**

What to do when people are Scheduled:

Visualizing the whole process of what to do when people are scheduled for a 1:1 meeting can be difficult – below you will find a flowchart that summarizes the whole process from start to finish for Intro 1:1s, which is then followed by details for each component.



• If at any point the person says they no longer want to meet, or do not want to meet in the first place, enter the response **Declined**.

• If when making the confirmation call the person needs to re-schedule, mark the **Scheduled** or **Need to Schedule** response again accordingly, so we can see the person was reached out to and more recently said they wanted to be scheduled again.

• If the person is going to attend the meeting, if they are scheduled in a VAN 1:1 event, mark their event status Confirmed; if not scheduled, just make sure you don't miss the meeting.

• If they do not show up to the meeting, mark the **No Show** response (specifically if they did not cancel ahead of time). If they show up to the meeting, it's time to use the 1:1 Data Entry form!

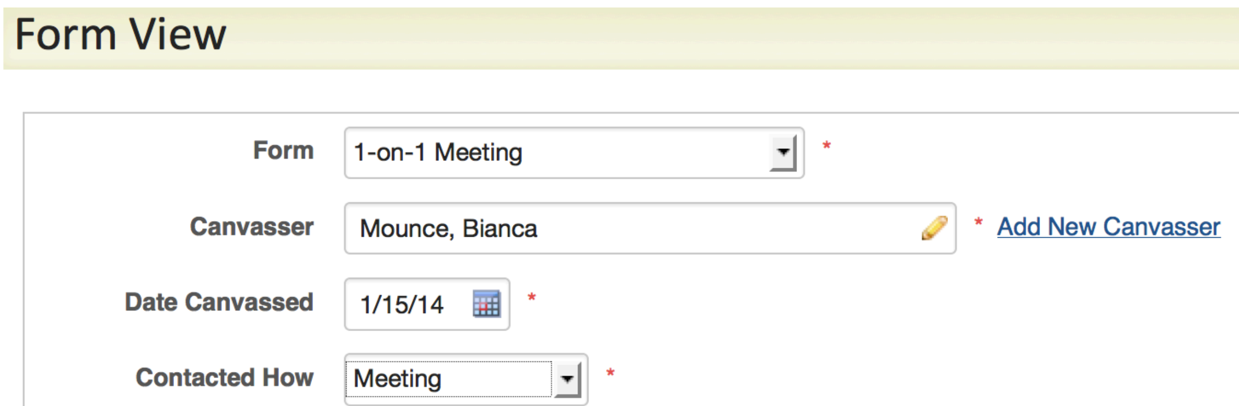
ORGANIZING FOR ACTION

One-on-One Form View Data Entry:

For 1-on-1s, use Form View from the Main Menu (and click Enter Data Using Form View in the submenu that appears, shown to the right):

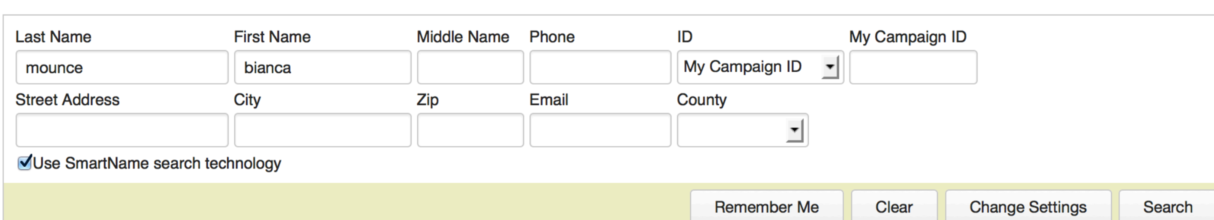
On the following screen, in most cases, choose Use Quick Lookup. Everyone should be in My Campaign already if they were scheduled for the meeting, but if not, use the Search My Voter file button and copy them, or add them manually if not found in either.

Before finding the profile in which to enter the data, you need to set up the form to be shown:

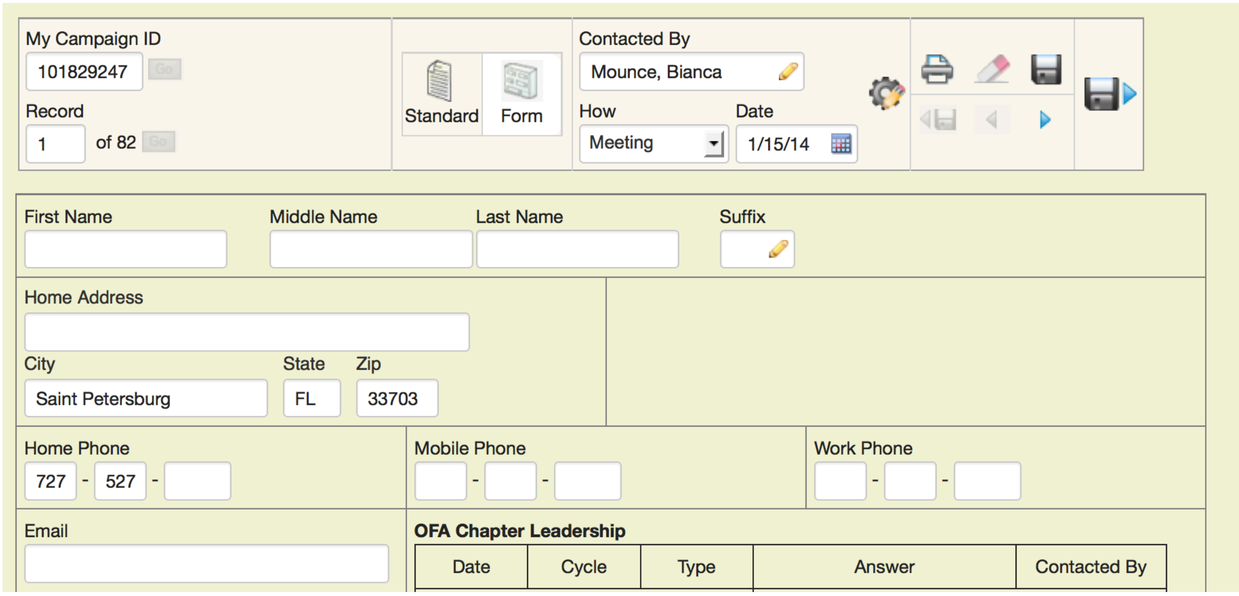


Remember to use the syntax [Last], [First] when entering the canvasser, select canvass type Meeting, and select the form called **1-on-1 Meeting**. When finished, click Next, which will bring you to the Quick Look Up screen within Form View.

Find the person using the information you have about them and click on their name – this will bring you to the form itself where you enter the information from your meeting.



ORGANIZING FOR **ACTION**



On this form you can update the person's contact information, as well as fill out information for these fields:

OFA 2013 Volunteer – if the person wants to volunteer with OFA in the future (Yes/No/Later)
1-on-1 Meeting – do not forget to mark the person as attending, and mark the correct type! These are some of the responses we are tracking for Organization building.
Issues – mark which issues are most important to the person
Constituencies – if the person belongs to a particular listed constituency, mark it

Last but not least, there are sections to mark Chapter and Team Leadership survey responses for the person. This form is conveniently set up to also show you any past responses they have to those questions, so it's easy to keep them up to date and avoid double tagging. More detail on those tags is on the following sheet.