The Portuguese American Citizenship Project
A non-partisan initiative to promote citizenship and civic involvement

NOTES ON THE COLLABORATION BETWEEN
THE PORTUGUESE AMERICAN CITIZENSHIP PROJECT, AND
THE CALIFORNIA CATHOLIC CONFERENCE AND THE PACIFIC INSTITUTE
FOR COMMUNITY ORGANIZATION (PICO)

INTRODUCTION AND SUMMARY

In August 2004, the Catholic Conference of California and the Pacific Institute of California (PICO) inaugurated a campaign to promote increased participation among members of 100 parishes from throughout the state. A center point of this campaign was based on the technical services provided by the Project.

There were a number of lessons learned during the campaign. (1) The decision to undertake the campaign was very late in the campaign calendar which limited participation to 23 parishes, far from the target of 100 parishes. (2) The process of obtaining data from county voter registrars and parishes went reasonably smoothly. (3) The size of parish membership lists varied - in some cases causing the Project to devote excessive resources to very small parish lists. (4) Some parish lists compiled by volunteers had questionable entries which raised doubts about the overall validity of the list itself. (5) PICO funding was not sufficient to cover all costs associated with the Project's provision of technical services largely because of start-up errors by the Project.

The question of continuing this collaborative relationship rests with the Catholic Conference of California/PICO. The original list of fees is amended, however, to provide for a minimum charge to cover fixed costs associated with smaller organizations.

The comments in this analysis are organized on the following points
        Inception of the campaign
        Procurement of government databases
        Procurement of parish databases
        Preparation of reports
        Project Charges
        Followup

BACKGROUND – TIMELINE

June 28, 2004. Representatives from dioceses met in Sacramento to discuss participation in the Project. Initial plans called for 100 parishes from throughout the state as the first participants.   The Catholic Conference enlisted the Pacific

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Institute for Community Organization (PICO) to provide the grass-roots activists and serve as the point of contact with the Project.

August 28. Church activists from throughout California participated in an organizing meeting in Sacramento. At the same event, the Project Coordinator met with PICO leaders to establish the process for managing the provision of parish and government data to the Project's office in Virginia.   The Project's schedule of charges (attached) served as the basis for fees for technical services.

September 13. The first parish dataset arrived from PICO.

October 1. PICO sent a check for $10,000 to provide for technical services and data processing.

October 29. The last of 22 parish reports were completed and sent to PICO. (The 23rd parish, the Cathedral of the Annunciation in Stockton, had already provided its membership list for the June 2004 election.)

INCEPTION OF THE CAMPAIGN

The campaign got off to a very late start.   To have a fighting chance of bringing 100 parishes fully into participation in the campaign, the decision to participate in the Project should have occurred no later than the Spring of 2004.

Planning for a political campaign is accomplished by thinking backwards from the date of the election. That is, a campaign manager must determine what he needs to have in place on the day of the election. Then, in order to be fully prepared on election day, the question becomes what work must be completed on the day before the election. In like manner, planning moves back weeks and months to ensure that, at each stage, preliminary work is undertaken to meet the next planning milestone.

With the November 2, 2004 election, the PICO goal was to have parish volunteers contact infrequent voters in selected parishes to encourage them to vote. These infrequent voters were identified by linking parish membership to voter registration lists and then creating a report of parish members who were registered to vote in November 2002 but did not vote.

The contact list should have been in the hands of local volunteers no later than two weeks in advance of the November 2 election, i.e., the week of October 17.

Church committees need a minimum of two weeks to organize a plan and mobilize volunteers to contact the target infrequent voters.

In order to have the full parish voter registration report to the parish, the following had to be successfully accomplished between the August 28 meeting and October 17 deadline.

1. Procurement of county registration data
2. Procurement of parish membership lists, or failing gaining that permission, the compilation of an alternate list of parish members by community volunteers
3. Mailing databases to the Project
4. Data compilation and report preparation by Project staff
5. Mailing completed studies and contact list to PICO
6. Delivery of the contact lists to the individual communities

The fact that 22 parishes were able to successfully run this gauntlet in such a short amount of time was remarkable.

The fact that the remaining 73 parishes were not able to prepare for the election was not unexpected.

PROCUREMENT OF GOVERNMENT DATABASES

The first building block for producing an analysis of the political strength of a parish is the voter registration and voter history files held by the county's registrar of elections. Judging from conversations with PICO staff, the first attempts by local volunteers to obtain voter registration information were frustrating. Some attempts were first resisted by county officials but in all cases of which we are aware, PICO was able to successfully advise the local volunteers on how to overcome these obstacles.

These difficulties only occurred in the initial stages. To prove this point, in Riverside County, the local community obtained the voter registration files but the voter history files were not included. A phone call from the Project to PICO pointed out the mistake. PICO communicated with the local community. The corrected data was in the hands of the Project within the week. That was a remarkable feat of coordination but, more importantly, demonstrated the ability of local volunteers to navigate the county's voter registrar office.

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PICO expressed concern over the cost of the government data. This cost of procuring voter registration data is manageable but unavoidable.   The frequency of database purchases depends on budgets and the degree of accuracy required by the organization.

In the Portuguese American Citizenship Project, we time our purchases of voter registration information both to measure the parish's voting strength and to prepare for upcoming elections. This process requires a continuous cycle of procurement.

- The initial purchase of voter registration data is used to compile reports on the voting strength of the local organization. This data is the building block for all future action.

- The next purchase occurs after an election's voting data has have been entered into the county's voter history databases. With this second round of data, the Project measures the efficacy of the previous campaign and establishes the databases of members registered for the next election.   If the elections are closely timed, i.e., a September Primary followed by a November General Election, the same voter registration file is used for both elections.

PROCUREMENT OF PARISH MEMBERSHIP LISTS

The second building block of compiling a parish report is the church's membership list including the names of adult heads of household and their addresses.

The procurement of membership lists was thoroughly discussed in the August 28 meeting but nonetheless was underestimated.

Pastors were rightfully concerned with preserving the confidentiality of their members' personal information. In response to a request from PICO, the Project Coordinator provided a letter to each pastor explaining the purpose of request for the parish membership list and assuring them that they retain complete control over this information at all times. A copy of the letter is attached.

If a pastor authorized the release of the parish membership list, a technical problem often remained.

The quality and size of the parish databases varied in the extreme. The parish lists ranged from St Anthaneus of Los Angles County, with 3,767 adult heads of household to St Teresa of Riverside County with 17 members listed in a database prepared by local volunteers.

Also, some parish databases had numerous misspelling and other clerical errors. The Project's process for data conformance takes that into account, however, and amends these errors when better data was available, i.e., a correct entry in the voter registration database.

When a pastor did not authorize the release of the entire membership list, local volunteers compiled lists of parishioners outside of Mass. There are two major problems with these self-selecting lists:

(1) In compiling statistics on the percentage of parishioners registered to vote, the Project divided the total number of adult heads of household parishioners registered to vote by the total number of adult heads of household parishioners.

The list compiled by volunteers is a sample of the total parishioner population. Because the sample is biased (i.e., parishioners who attend Mass and are willing to provide their personal information are more likely to be politically engaged than the general parish population), statistics from the measurement of registered voters from this group would likely overestimate the actual voter registration rate of all parishioners.

(2) These lists also contained disturbing entries such as "Anonymous" or "Occupant." While these entries were rare, it called into question the process of collecting this information and the resulting validity of the list.

PREPARATION OF REPORTS

Reports were completed and returned to PICO in most cases within 7 to 10 days of receipt. (See the attachment for a description of the Project's process for producing parish reports.)

Seventeen parish databases were received by the Project before October 10 and completed reports were returned to PICO prior to October 17. This schedule should have allowed at least the minimum time necessary for parish committees to formulate plans of action for contacting the infrequent voters.

Five databases were received by the Project after October 17 and reports were prepared as expeditiously as possible. The last report was mailed on October

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29, four days before the election, which probably arrived at the parish too close to the election for meaningful action.

RECEIPT OF PARISH DATABASES
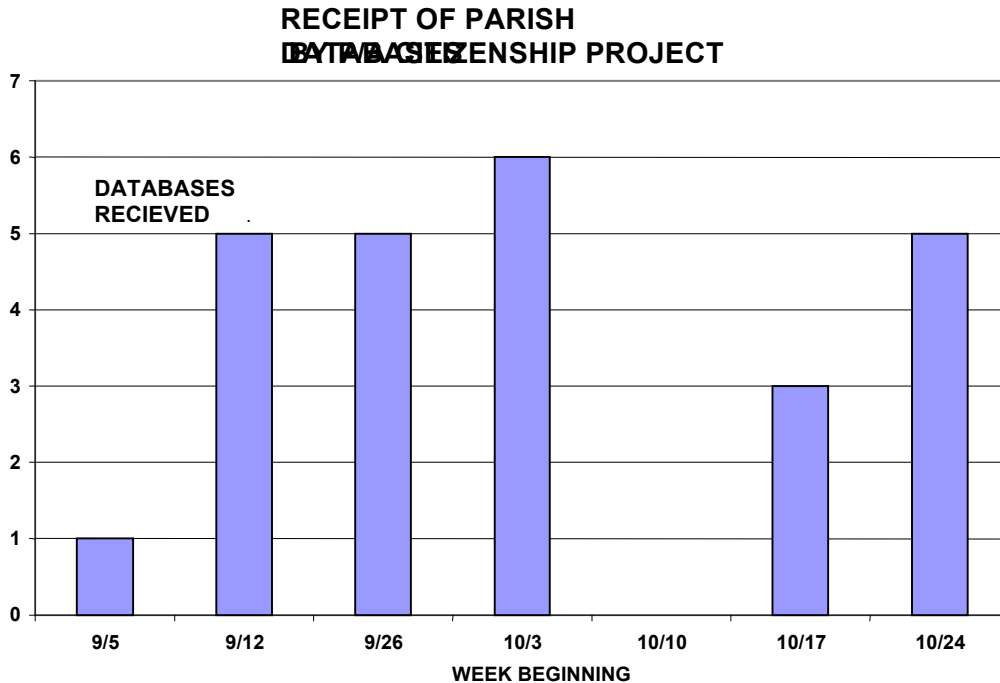
A completed report consisted of

- A bound paper copy of summary statistics regarding the parish adult heads of household surveyed, the number registered to vote and the number of all heads of households who voted in elections over the past three to four years. The printed report also calculated the parish voting turnout – parishioners who vote in an election divided by the parishioners eligible to voter – and compared the parish performance to the county turnout for the elections.

- Two electronic databases on a CD. The first database presented each parishioner and their voting status. The second database presented a list of all family members registered to vote – that is heads of household and all other family members registered to vote – and their individual voter history.

- A printed report which listed infrequent parish members, i.e., those parishioners registered to vote but who did not participate in the November 2002 election.

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PROJECT CHARGES

It must be understood that the Portuguese American Citizenship Project is willing to provide its technical services to non-Portuguese American entities in order to generate funding for Project's efforts within the Portuguese American community. That is the Project must generate a surplus in the provision of its services to make the collaboration justifiable in terms of its own charter.

The PICO funding did not cover all of the costs associated with provision of these technical services for the November 2004 election. The deficit problem occurred because;

(1) The Project trained staff for an anticipated workload of 100 parishes. This training proved unnecessary since the workload consisted of databases from only 22 parishes which was accomplished by in-house staff.

(2) The participation of the Coordinator in the August 28 Sacramento conference was not charged to the PICO account because it occurred before the collaboration was actually formalized.

(3) Finally, as noted above the size of the parish databases varied from 3,700 to 17 parishioners. The examination of each non-registered member varies according to the size of the parish list. A 3,000 member church will involved twice the time to examine of a parish of 1,500 members. On the other hand, there is a minimum of work for a parish list of even one person. Official data must be assembled, analysis must be accomplished, reports have to be prepared, edited, and assembled for forwarding to PICO.

This fixed portion of the report preparation alone involved two man-days of work. The charge for St Teresa's 17 member list generated funding of $4.25. In this case, the Project provided a significant subsidy to Catholic Conference/PICO work.

The only change proposed in this schedule of charges is to establish a minimum charge of $250 for each database to cover the fixed charges for preparing a report. For example, if a parish has over 1000 members, there will not be a change in fees. If, however, a parish provides a list of 700 members, the fee for

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a report will no longer be $175 (700 X $0.25 per member) but will be assessed at the minimum charge of $250.

FOLLOWUP

The question of continuing this collaboration rests with the Catholic Conference of California and PICO. Assuming that this is an ongoing process, the following priorities should addressed;

> Complete the recruitment of the remaining parishes from the original target of 100 parishes. Obtain parish membership lists and appropriate voter registration lists if required.

> Purchase voter registration and voter history databases for analysis of performance of participating churches. A completed list of infrequent voters who were contacted should be returned to the Project to determine if efforts to encourage these parishioners to vote were successful.

> Compile a schedule of local elections in 2005. Plan to promote parishioner participation in selected targeted elections. In 2005, there will be local school board elections, county elections and even special elections which will affect California Catholics.

Subject to approval by the Project's Board of Directors, the Project is prepared to continue to work with the Catholic Conference/PICO but with the revision on the minimum charge per organization as discussed above.

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ATTACHMENTS

1. **SCHEDULE OF FEES**

2. **LETTER OF CONFIDENTIALITY**

3. **PROCESS FOR ANALYSIS AND PREPARATION OF VOTER REGISTRATION REPORT**

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1. SCHEDULE OF FEES

LABOR PER INDIVIDUAL ORGANIZATION MEMBER TO CONFORM DATABASES	**$0.25**
LABOR PER INDIVIDUAL ORGANIZATION MEMBER TO PREPARE CONTACT LISTS AND VOTER REMINDER CARDS	**$0.20**
PER DIEM COST FOR ON-SITE CONSULTATION BY PROJECT STAFF	**$610.00**

NOTE: A MINIMUM CHARGE OF $250 WILL BE ASSESSED FOR EACH PARTICIPATING ORGANIZATION

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2. LETTER OF CONFIDENTIALITY

August 10, 2004

1625 Hunting Ave
McLean, Virginia 22102

Dear Pastor

In response to the National Conference of Catholic Bishops' call to Faithful Citizenship, your parish has decided to make use of the services of the Portuguese American Citizenship Project.

An integral part of this participation is for the parish to provide information on its membership to the Project. The Project is intended only to serve as a technical resource to merge your parishioner information with voter registration data.

The Project will match this information to government data and provide to the parish a comprehensive report on the voter registration and voting history of its parishioners. This information constitutes the fundamental element of measuring the political strength of the parish and is the basis for deciding how best to promote greater civic participation.

You retain complete control over all uses of this data. As part of its technical services, the Project will send the parish a data disk with individual members separated according to voter registration status. What the parish does with this information is solely for the parish authorities themselves to decide.

The Portuguese American Citizenship Project may only use summary statistics for the purposes of measuring the effectiveness of campaign strategies. These summary statistics, and only these summary statistics, may be shared with other participating organizations, funding organizations, and related interested parties. This understanding specifically does not extend to sharing information on any individual member or members.

If you have any questions or further concerns, please feel free to contact me.

Sincerely

James Martin McGlinchey

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Project Coordinator

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3. PROCESS FOR ANALYSIS AND PREPARATION
OF VOTER REGISTRATION REPORT

The Project conformed the parish data to its software requirements, and matched the membership list with government registration lists. The process of matching these different databases is not a trivial problem: it is the most sensitive and time-consuming part of the preparation of databases.

The Project staff matches the parish list with the voter registration list with a link mechanism which utilizes the parish member's first name, last name, street number, and street name.

When the first name, last name, and street address are identical in both the voter registration and parish databases, the parishioner is categorized as 'registered to vote.'

The Project staff then examines alternative names for each member who cannot be confirmed as registered to vote. This examination involves checking alternative spellings of first and last names with possible alternative listings for each member not originally classified as registered. Often, parish members in the immigrant community use one name within their ethnic organizations – including the church - and another name with the official community. For example, a "Jose" to the Church could be listed as "Joseph" in the voter registration lists. If an alternative is found, i.e., a "Joseph" at the same address and with a matching data of birth, the staff changes the parish database for that individual to conform to the voter registration. That parishioner is then re-categorized as 'registered to vote.'

Finally, the Project staff examines alternative addresses for parishioners who remain not classified as registered. The parish directory may use "Oak Street" as an address for a parishioner but the Registrar of Elections may use "North Oak Street" for the same address. To a computer system, these two addresses are different. As with the examination of names, if an alternative address is found for a parishioner still listed as not registered, the staff changes the parish database for that individual to conform to the voter registration data. That parishioner is then re-categorized as 'registered to vote.'

For example, in a parish of 1,000 members, 200 to 300 will have identical names and addresses in both the parish list and the voter registration rolls. The examination of alternative names and addresses for each of the remaining 700 to 800 parishioners not immediately matched will result in the reclassification of an additional 200 to 250 members as registered to vote.

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