

Managing Data Across Legal Entities

Webinar 6 : Membership and Data: Data for Building Power

WATCH RECORDING

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This webinar walks organizers through key questions and answers about how to utilize and manage powerful data across legal entities.



DOWNLOAD WEBINAR RESOURCE:

[Multi-Entity Data Resources Sheet](#)

Key Questions To Bring Back To Your Organization:

1. What metrics can we collect in election years to support community organizing?

You reach out to many, many voters during election years and this is a real opportunity. Touching so many people allows you to identify supporters, and invite them to take action with you for advocacy (both (c)(3) and (c)(4) activities). When going into an election year, decide what kind of data would be most useful to your long-term organizing work. When doing voter registration calls, would it be helpful to ask the top issues the voter cares about or to know if they're interested in receiving updates or in taking direct action? If you offer services, might you want to share those and ask which ones they might be interested in? If yes, ask for their cell phone number and email, and permission to call, text, and email and develop systems to collect, track, and analyze and then use the data (i.e., follow up).

2. Does our staff have shared language and definitions around legal compliance, data, and organizing?

As organizers, you know that language matters. It can be hard to align teams if you don't have shared definitions. It can help to ensure your organization has written definitions of "member," "supporter," "data," "(c)(3) activity," and "(c)(4) activity." Consider evaluating your team's alignment on language and developing a glossary to support shared understanding.

3. Are we engaging our data staff from the start?

To create a data-informed organization and strategy, you need to bring your data staff into early conversation when you are planning campaigns or developing surveys or scripts. Collaborate with them from the start. Ask your data staff key questions

such as: What metrics are we able to track with our tools? How can we ensure we follow up with target supporters via email, text message, phone banking, and/or one-on-ones?

4. Do we know how to accomplish what we want to accomplish legally? Do we know who to ask?

There are no clear-cut answers as to how data must be structured to comply with the law. Rather, organizations and staff must base decisions on a mix of strategy and organizational tolerance for risk. It is important to know when to ask questions and who to go to when you have questions. Consider offering your data team training and support and/or access to legal counsel so they know who to ask for questions. Consider designating a point person in your organization whom staff can go to with any legal questions, and ensure that person is empowered to work closely with your attorney. Building an organizational culture that fosters asking questions to the right folks is more important than knowing the answer.

5. Do we have good data collection processes in place?

Your internal processes and practices for data collection matter. Make sure you have a clear process for submission and management of data. Those processes should address how key data is submitted, how data is synced among tools, and how data is shared between legal entities (e.g., your (c)(3) and (c)(4)).

Tips to Keep in Mind in Your Work:

1. Data should be used to build power.

Data can help your organization follow up with supporters, understand member needs, tell members stories, make decisions, and show impact. Begin every campaign or program asking what your goal or demand is, what tactics you will use, and what metric goals will help you focus on your team and measure your impact. Data can also help elected officials understand how many supporters you have in their district and/or help your staff determine how best to leverage member engagement strategically to achieve your goals. Consider what other data helps your organization make informed strategic decisions and leverage power effectively.

2. Build your dream team.

Invest in data talent. If data is critical to your strategy, you need data staff. And you need a team around that data staff – consider how your organizing team, compliance team, strategy team, and data team might work together.

3. Joint acquisitions is a best practice!

If you work at a multi-entity organization, it matters how the data comes into your family of organizations. Setting up joint acquisition of data for the (c)(3) and the (c)(4) is a best practice. This is often called list sharing. Talk with your organizing and executive team about how and whether to adopt joint acquisition practices at your organization. More detailed information on the topic of joint acquisition can be found in Bolder Advocacy's webinar "[501\(C\)\(3\) and \(C\)\(4\) Membership Programs: Navigate the Law](#)" and in their publication [The Connection](#) (pg 52).

4. Your 501(c)(4) must pay market value for 501(c)(3) data.

Your (c)(4) can rent, buy or swap data—but it must pay fair market value for it. See additional information in the webinar deck or read tips from Bolder Advocacy (included in the resource sheet below) to learn more about fair market value.

5. Don't skip on training—invest!

Data and technology are constantly changing. Ensure your organization has a learning culture around data. Support your data staff in continuous learning and provide them with access to learning opportunities for data specialties, data peers, and legal compliance experts. But don't stop with your data team—ensure your entire staff have shared definitions around data.



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