Project Scoping Worksheet

1. Project Name: #Winning The Elections

2. Organization Name: Bartlett for America

3. Project Description: The goal of the project is to define an analytical strategy for winning the presidential elections

4. Who are the agencies/departments that will need to be involved? Every department in the campaign

5. Who are the individuals in these organizations that are stakeholders? What are their role? Directors of every department

6. Goals (in order of priority)

What are you maximizing or minimizing?
Are there any constraints (budget, resources, etc.)?

Goal 1: Maximize probability of getting at least 270 Electoral Votes	Goal 2:	Goal 3:
Constraint: Budget	Constraint:	Constraint:

7. Actions

What is the action? Who is taking the action? What/Who is it being taken on? How often?

Action 1: Register Voters	Action 2: Persuade voters to support our candidate	Action 3: Persuade voters to vote
Questions	Questions	Questions
A. Who should we target?	A. Who should we target	A. Who should we target
B. What channel should we use?	B. What channel should we use?	B. What channel should we use?

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8. Data

A. What Data do you have internally?

Data Source Voter File	Data Source Polling Data	Data Source Fundraising and Volunteer Database
What does it contain? List of all registered voters, vote history, and demographics	What does it contain? Responses to question	What does it contain? Names, contact information, donation and volunteer history
What level of granularity? Individual	What level of granularity? Individual	What level of granularity? Individual
How frequently is it collected/updated? Every Few days to every few months	How frequently is it collected/updated? weekly	How frequently is it collected/updated? Real-time
Does it have unique identifiers that can be linked to other data sources? Sometimes: name, address, phone, age, etc.	Does it have unique identifiers that can be linked to other data sources? Sometimes: name, address, phone, age, etc.	Does it have unique identifiers that can be linked to other data sources? Sometimes: name, address, phone, age, etc.

B. What data can you get externally and/or from public sources?

Data Source Behavioral Data from marketing companies	Data Source American Community Survey	Data Source Social Media & Network
What does it contain? Purchase behavior	What does it contain? Demographic Data	What does it contain? Social media posts and social networks
What level of granularity? Individual	What level of granularity? Census block	What level of granularity? Individual

How frequently is it collected/updated? unknown	How frequently is it collected/updated? 1/year	How frequently is it collected/updated? Real-time
Does it have unique identifiers that can be linked to other data sources? Usually not	Does it have unique identifiers that can be linked to other data sources? Block level identifiers	Does it have unique identifiers that can be linked to other data sources? Usually not

C. What data would you need in addition to the ones above?
Data Source: Unregistered Voters
Data Source: Media consumption data

9. Analysis

What analysis needs to be done? How will you validate the analysis? What action(s) will each analysis inform?

Analysis 1: Predict probability of being unregistered	Analysis 2: Predict probability of supporting our candidate	Analysis 3: Predict probability of voting
Analysis type: Prediction	Analysis type: Prediction	Analysis type: Prediction
Which action will this analysis inform? Target people to register to vote	Which action will this analysis inform? Target "Get Out the Vote" efforts	Which action will this analysis inform? Target "Get Out the Vote" efforts
How will you validate this analysis? Use historical data to validate	How will you validate this analysis? Use polling/surveys to validate the predictions	How will you validate this analysis? This is tough. We want to validate on historical data, on polling/survey data, and eventually post-election on actual data.