

Canvass Reform - Determined Electors and Recent Additions Helpsheet

Intended audience:

Electoral Registration Officers / Electoral Service Managers / Electoral Administrators

Purpose:

This helpsheet will provide you with information and a worked example of how to utilise the options within Canvass Reform relating to electors who have recently registered to vote at the commencement of your canvass process.

Background

The Interim Statement of Policy, section 3, details certain groups that can or must be exempted from the data matching step. This includes determined electors who are not yet on the register, but who will be added on the next monthly update, and the option to exclude recent additions to the register. This help sheet is going to look at how to apply these exemptions and what you need to consider in setting your options.

Terminology

Determined elector: Someone whose application to register to vote has been successfully determined by the Electoral Registration Officer (ERO). However, they will not be added to the register until the next monthly notice of alteration is published.

Recent additions: Electors who have submitted a recent, successful application to register and have been added to the electoral register. The ERO has the discretion to decide what is classified as a recent addition for their area by setting a recent additions threshold.

This threshold can be set up to capture any recent addition up to 90 calendar days before the start of the data matching step. Setting this threshold at 0 would mean that no electors would be classed as recent additions and therefore would be sent for data matching.

What can you do with determined electors and recent additions?

	Data matching step	Impact on Canvass Route
Determined electors	Must NOT be data matched	<p>Determined electors will automatically be marked as matched as they have only recently provided their application.</p> <p>You then have the discretion to follow one of two options:</p> <p>You may decide which Route to send a property down based solely on the individual elector match scores, which, as long as all other electors in the property are also matched, means that you may send properties with determined electors down</p>

		<p>Route 1.</p> <p>OR</p> <p>You may decide that the presence of a determined elector suggests that further additions or deletions are likely at the property, in which case you should send the property down Route 2, even if all electors in that property are classified as matched.</p>
<p>Recent additions (up to 90 calendar days before the start of the data matching step)</p>	<p>Can include or exclude from data matching at your discretion.</p> <p>If you wish to exclude them, you must set a time period at threshold for up to 90 calendar days before your data matching step in order to classify electors who fall within this threshold as recent additions.</p>	<p>If included in the data step, then the match results provided for these electors must be taken into account when deciding which Route to send the property down.</p> <p>If excluded from the data step, the recent addition will be marked as matched, as they have only recently provided their application so are unlikely to need to report further change.</p> <p>However, you will still have the option to send the property down Route 2 if you are not satisfied they have captured all additions and deletions needed for the property.</p>

Considerations

Key questions to ask when deciding your approach to determined electors and recent additions:

- Are you satisfied that you will capture all changes required from the property? Please note that if you suspect that there are more changes in household composition to capture, for example if you feel that the existence of a determined or recent addition in a property indicates there may be more potential additions, you should send the property down Route 2.
- Do you have processes in place, if one person registers, to capture other people in the property who should also register, i.e. if someone has recently applied to register, are you likely to have captured other new electors at that property?
- Do you have processes in place to delete existing registered electors from the property if they have moved out?
- Do you have high churn in your area?

Do I override the match rate for determined electors and set the property to Route 2?

Determined electors are not allowed to go through the national data matching step, as they are not registered electors until they appear on the next monthly update and they may return false results when matched alongside data if the elector has recently moved.

Determined electors will be automatically marked as matched. At previous workshops on the Canvass Reform policy, there was a clear split on how electoral administrators wanted to treat these electors. You will have the option to set the properties with determined electors to go down Route 2 regardless of the match rate of the individual electors in the property. This would be used when you are not satisfied that all additions and deletions have been captured within the property.

Do I put my recent additions through the data match or not?

You will have the discretion to choose whether or not to data match recent additions to the register. If you do not wish to data match recent additions, you will have to set a threshold within your EMS between 0-90 calendar days before you begin the canvass in order to exclude additions within this time period. The 0-90 calendar days is calculated backwards from the day you start the data matching step under the reformed canvass. Electors added to the register within this threshold will be automatically excluded from the data matching step and will be set as matched, as they have recently engaged with you and have likely provided the most up to date information.

If you do not wish to exclude your recent additions from the data matching step, you should set your threshold to 0 days within your EMS.

Please note that 'start of canvass' will mean the date at which you begin your data matching step under the reformed canvass.

For the Canvass Reform Data Test, you should calculate the recent additions threshold from the date you start the canvass within your EMS system and the snapshot of your register is taken for the data matching step to be performed against..

If I don't put recent additions through the data match, should I set the property to Route 2?

Recent additions will be classified as matched within your EMS in accordance with the threshold you set. You will then have the option to set the properties with recent additions to go down Route 2 regardless of the match rate of the individual electors in the property.

If there has been a recent addition to the household, you may feel that the household is unlikely to have any more updates (additions or deletions) to provide, therefore it would be safe to send the property down a Route 1 canvass if any other electors registered at the property are matched. If, however, you feel that the existence of a recent addition in a household indicates there may be other changes in household composition to be reported, it should be sent down Route 2.

You should consider the key questions detailed above in the consideration section. Remembering that a property should only be sent down Route 1 if you are satisfied that no additions **or** deletions need to be made.

If I don't put the recent additions through the data match, what threshold should I set as the maximum number of days to count as a recent addition?

Recent additions will be determined by a threshold you set within your EMS. This threshold can be set from 0-90 calendar days from the date which you conduct your data match (or, for the data test, 0-90 days from the date at which you start the 2019 canvass).

You will also wish to consider the impact of determined electors on your recent additions threshold. As all determined electors will automatically be excluded from the data match, setting your recent additions threshold at a short interval may have no impact on excluding recent additions, as the two categories will overlap. Please see the **worked example** below to further explain this.

Worked example

An ERO begins their data matching step on 5 July 2019, and they decide to exempt their recent additions from the data matching step. This example shows the interaction between recent additions and determined electors.



Please note the start of canvass date shown is for example purposes only, please alter for your own start date. This diagram also shows the recent additions threshold as being set to the maximum 90 days

Using the example above the following would apply:

Determined electors - Someone who has submitted an application between 7 June (which is the application deadline for 1 July register update) and the start of the data matching step (which for the purpose of the example above is set as the 5 July), and who has been successfully determined during that time but has not yet been added to the register.

Recent addition - If you set your recent addition threshold to the maximum, this is someone who has been successfully determined up to 90 days before you start the data matching step (which is the 6 April in the example above) and 17 June (determination day for 1 July register) AND whose application was submitted prior to 7 June (application deadline for 1 July register).

You can see from the diagram above that setting the 90 day threshold between 0 and 28 days would make no difference, as any application submitted between 0 and 28 days prior to the start of canvass/data matching step would be classed as DETERMINED ELECTORS, not RECENT ADDITIONS, therefore would automatically be excluded from the data matching step.