PROGRESS TO GOAL REPORT SETUP

A step-by-step guide to assembling your report

GETTING STARTED

Throughout any campaign, it is important to set out a strategy with concrete goals for holding quality conversations with voters. It is equally important to measure the progress to goals to ensure the campaign stays on track and adjusts as needed. The Progress to Goal (PTG) template will help your campaign integrate your goals and outreach in one place where campaign leadership can monitor progress.

The PTG report tracks volunteer recruitment, persuasion, turnout, and voter registration metrics. Your program may only focus on a few of these metrics, but the report is meant to be flexible enough for you to customize to your campaign.

To get the most out of the report, we recommend using the Arena Organizing Goals Calculator and tracking volunteer shifts in VAN's MyCampaign or some type of CRM for volunteer management. A number of the data sheets in this tool are designed with VAN's Votebuilder in mind. If you are using a different system to track voter contact and volunteer recruitment, further customization may be necessary.

We understand, however, that managing a CRM can be difficult for smaller campaigns without a dedicated data manager. So, with that in mind, we have made another version of this report where soft numbers can be entered by organizers via a Google form, rather than exported from VAN.

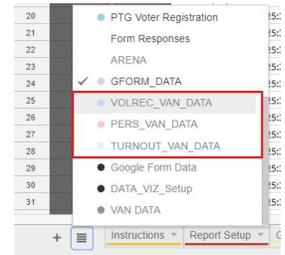Arena PTG Report [Google Form Only]
Arena PTG Report [Google Form + VAN]

SELECT METRICS & ALLOCATE GOALS

In the "Report Setup" tab, select the metrics you want to track in the report.

Next, enter in the names of your regions and organizers in the yellow cells.

In the adjacent light blue cells, allocate the percent of the overall universe given to each organizer for recruitment, persuasion, turnout, and voter registration. (If you are not using a certain strategy on your campaign—voter registration, for example—enter zeros).

This step sets up the region, organizer, and goal information that appears on other PTG tabs in this spreadsheet.

IMPORT YOUR GOALS FROM ARENA GOALS CALCULATOR

Next, copy your campaign goals from the Arena Goals Calculator "Goal Export" tab into the "Goals" tab in the PTG report, starting at cell F4. Paste Values only using paste special (PC right click in F4 cell to paste special and select values only or MAC: Control + Click to paste special and select values only).

Update this tab anytime goals are adjusted or changed.

Alternatively you can enter the following "IMPORTRANGE" formula into cell F4 on the "Goals" tab

=IMPORTRANGE("< FULL URL of YOUR GOALS CALC IN QUOTES HERE>","Goals Export!A2:BA60")

This will sync your goals calculator with your report, and will update automatically anytime you change goals.

SET UP A GOOGLE FORM

Use a Google Form to collect metrics from organizers in the field. Depending on whether or not you have VAN and a data director, there are two separate Google Forms:
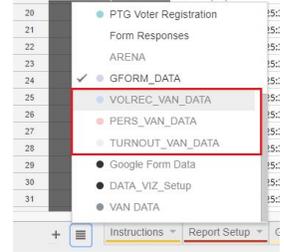
For smaller campaigns without a VAN administrator, use this form:
> GOOGLE FORM ONLY: Copy and Edit this Google Form to customize for your own campaign

For campaigns tracking voter contact in VAN, use this form:
> GOOGLE FORM + VAN: Copy and Edit this Google Form to customize for your own campaign

Larger campaigns with a data director should strive to track all voter contact and volunteer recruitment in VAN. See the section on VAN Data in this guide for further instructions.

LINKING YOUR GOOGLE FORM TO THIS REPORT

After you copy and save this spreadsheet to your Drive, create your Google Form:

- Open your form in Google Forms.
- At the top, click Responses.
- Click the button next to the Spreadsheet icon
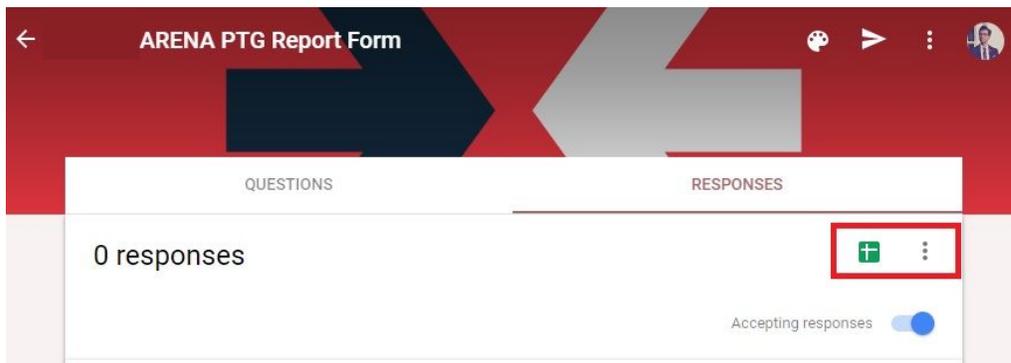
- From the drop-down menu, click on "Select response destination"
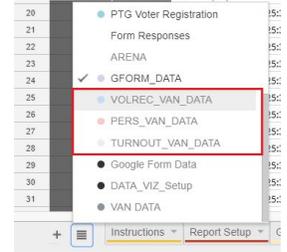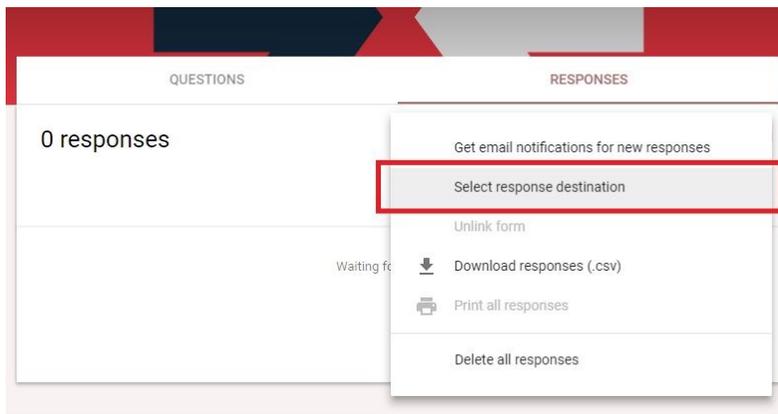
- Click "Select existing spreadsheet"
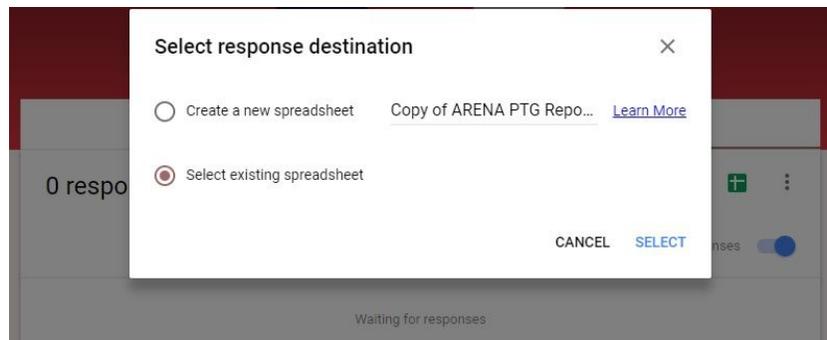
- Choose your copy of this spreadsheet
- Click Select
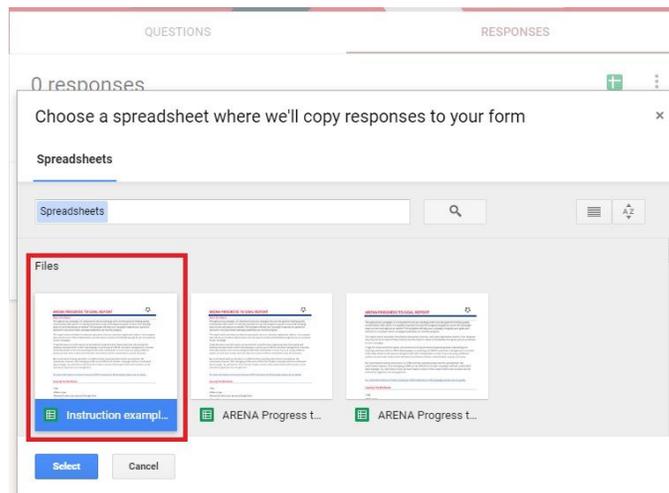
This will link your form to this spreadsheet, as long as it is in the same format as the example form (see below for more details).

After your report is linked, complete the following steps.

STEP 1

A new tab will appear called "Form Responses #"

- Delete the old form responses tab by right-clicking on the tab, unlinking the form and then deleting
- Rename new form tab to "Form Responses"
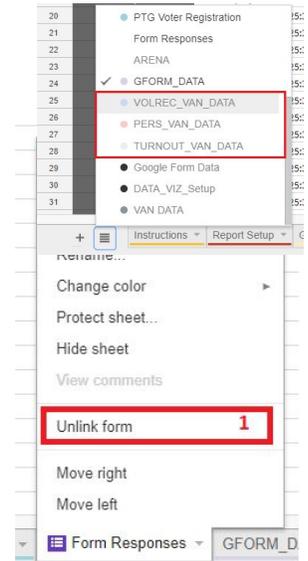
STEP 2

Now that the form responses are linked, you need to update a formula on the GFORM_DATA tab. This "Array Formula" helps existing formulas and data named ranges find and display the appropriate data.

After adding the new "Form Responses" tab, the "GFORM_DATA" tab will be blank, and you will see errors in cells B2 to AB2. It should look like the picture below.

- To update formulas, double-click in the cell B2 to the show the formula and hit Enter. This will update the formula and will show the first column header "Timestamp."

- Next, copy the B2 formula and paste over cells C2 thru AB2

After updating the formulas row 2 B thru AB, your spreadsheet should look like the one below.

Column A updates once data is submitted via the form. The formula in column A classifies each entry as This Week, Next Week, or Last Week.

STEP 3
Complete this step only if you have added, removed, or reordered metrics on the original Google Form.

This report utilizes a Google Sheets function called "Named Ranges" to make it possible to reorder and integrate metrics into the report easily. Before this report is ready to use, check to ensure the named ranges are looking up the appropriate columns in the form data that is now synced to the GFORM_DATA tab.

Make sure that each named range is assigned a metric. You can do this by going to the top menu and selecting Data then Named Ranges from the dropdown. Check to make sure the type of data in the column corresponds to the title of the named range.

For example, Pers_DoorAttempts is the name for column S on the GFORM DATA tab and corresponds to the Persuasion door attempts data that organizers enter in the Google Form daily.

To edit or delete a named range:
- On the top menu select > Data followed by > named ranges.
- On the named range you want to edit or delete, click Edit.
- To edit the range, enter a new name or range, then click Done.

Before you make the report live, double check that your named ranges are correct and that data is appearing in the correct parts of the report.
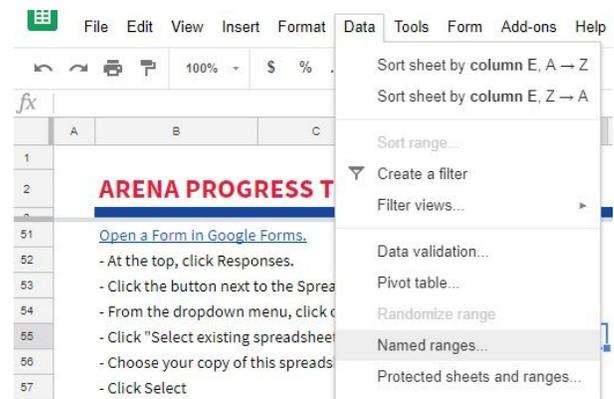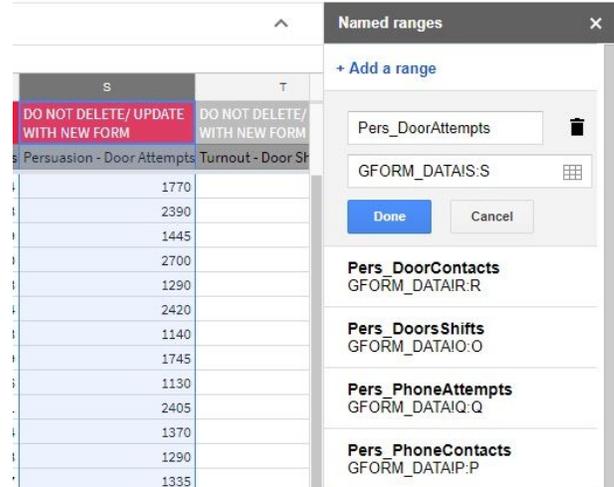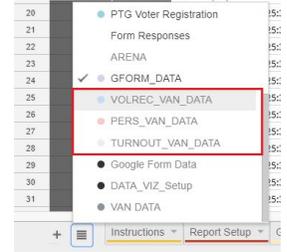
VAN DATA

Campaigns that are using the **ARENA Progress to Goal Report - GOOGLE FORM + VAN** will need to export data from My Voters and My Campaign in VAN to update the report.
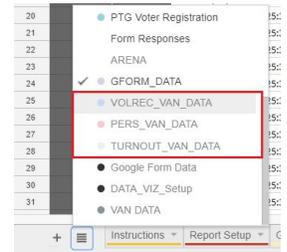
From the VAN main menu, go to "Report Manager", then select "Canvass Results" in the Reports section. To set up your export:
1. Set dates:
   a. This Week (weeks starts on Saturday)
   b. Total (since the start of the campaign or after primary)
2. Set Contact Type:
   a. Phones: Phone, Auto Dial (if applicable)
   b. Doors: Walk
   c. Text: SMS Text
3. Group by: Set this to organizer or political geography assigned to organizers.
4. Targets: Filter to persuasion or turnout universes. If you don't have targets set up, you can use the filters to narrow to a universe list.
5. Refresh: Once criteria is set, hit Refresh to update results.
6. Export: Hit Export to download the results.

We recommend updating VAN data in the PTG Report multiple times a week during early stages of the campaign and then updating daily in the final months of the campaign.

In the **ARENA Progress to Goal Report - GOOGLE FORM + VAN**, there are three additional data tabs where data from VAN can be placed. Each data page will have its own color, and will indicate how many exports are required for each tab.

Using the data you just exported from VAN, populate the following tabs.

VOLREC_VAN_DATA
In this tab, paste in volunteer recruitment data for this week and total.

Volunteer Recruitment
This Page has 2 Exports for Phone results for this week and total results
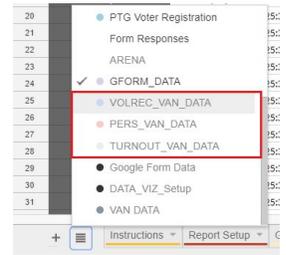
Export 1 — Input Type: Phones

Organizer	Not Home (# of Attempts)	%	Refused (# of Attempts)	%	Moved (# of Attempts)	%	Deceased (# of Attempts)	%	Canvassed (# of Attempts)	%	Total Attempts
Organizer 1	124	58%	9	4%	15	7%	0	0%	64	30%	215
Organizer 2	52	4%	2	0%	10	1%	0	0%	48	4%	1,165
Organizer 3	125	65%	0	0%	0	0%	0	0%	22	12%	191
Organizer 4	36	55%	3	5%	0	0%	0	0%	9	14%	66
Organizer 5	107	70%	2	1%	4	3%	0	0%	39	26%	152
Totals	**444**	**25%**	**16**	**1%**	**29**	**2%**	**0**	**0%**	**182**	**10%**	**1789**

Phones
> **This week** - cells B through M
> **Total** - cells O through Z

PERS_VAN_DATA
In this tab, paste in persuasion canvass data for this week and total.

PERSUASION
This Page has 6 Exports for Phone, Walk, and text message results for this week and total results

Export 1 — Input Type: Phones

Organizer	Not Home (# of Attempts)	%	Refused (# of Attempts)	%	Moved (# of Attempts)	%	Deceased (# of Attempts)	%	Canvassed (# of Attempts)	%	Total Attempts
Organizer 1	124	58%	9	4%	15	7%	0	0%	64	30%	215
Organizer 2	52	4%	2	0%	10	1%	0	0%	48	4%	1,165
Organizer 3	125	65%	0	0%	0	0%	0	0%	22	12%	191
Organizer 4	36	55%	3	5%	0	0%	0	0%	9	14%	66
Organizer 5	107	70%	2	1%	4	3%	0	0%	39	26%	152
Totals	**444**	**25%**	**16**	**1%**	**29**	**2%**	**0**	**0%**	**182**	**10%**	**1789**

Contact Type: Phones
> **This week** - cells B through M
> **Total** - cells O through Z

Contact Type: Doors
> **This week** - cells AB through AM
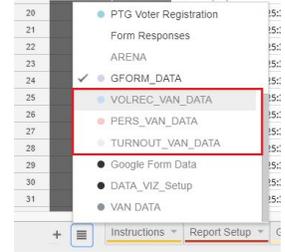> **Total** - cells AO through AZ

Contact Type: Text

  This week - cells BB through BK

  Total - cells BM through BV

TURNOUT_VAN_DATA

In this tab, paste in turnout canvass data for this week and total.

	Organizer	This Week Not Home (# of Attempts)	This Week %	This Week Refused (# of Attempts)	This Week %	This Week Moved (# of Attempts)	This Week %	This Week Deceased (# of Attempts)	This Week %	This Week Canvassed (# of Attempts)	This Week %	Total Attempts
	Organizer 1	124	58%	9	4%	15	7%	0	0%	64	30%	215
	Organizer 2	52	4%	2	0%	10	1%	0	0%	48	4%	1,165
	Organizer 3	125	65%	0	0%	0	0%	0	0%	22	12%	191
	Organizer 4	36	55%	3	5%	0	0%	0	0%	9	14%	66
	Organizer 5	107	70%	2	1%	4	3%	0	0%	39	26%	152
	Totals	**444**	**25%**	**16**	**1%**	**29**	**2%**	**0**	**0%**	**182**	**10%**	**1789**

TURNOUT

This Page has 6 Exports for Phone, Walk, and text message results for this week and total results

Export 1 — Contact Type: Phones

Contact Type: Phones

  This week - cells B through M

  Total - cells O through Z

Contact Type: Doors

  This week - cells AB through AM

  Total - cells AO through AZ

Contact Type: Text

  This week - cells BB through BK

  Total - cells BM through BV