How To Set Up Scoring
In Salsa
So you want to set up scoring in Salsa? Salsa Labs’ Scoring feature takes your supporter engagement strategy above and beyond with fully customizable behavior metrics. If you haven’t already, take a few minutes to read Jason Zanon’s whitepaper on scoring. When you are ready, follow this handy guide to walk you through, step-by-step, the process for establishing scoring in Salsa. Still have questions? Check out our handy FAQs, or contact Salsa Support.

Ready to give Scoring a shot? It’s shockingly easy to do. To lay it out, I’m going to be using words like “algorithm” and “half-life” here, but I promise you won’t need your slide rule. In fact, you’ll hardly need numbers at all: Salsa’s software does the dirty work for you, based on a few simple settings.

I. Get the Scoring Package for Your Account.

Your account might or might not have Scoring installed out of the gate. Click the “Supporter Management” tab and look for “Scoring” among the navigation panel options within Supporter Management.

If it’s there, you’ve got everything you need. If it’s not, drop a line to Salsa support and we’ll install it for you tout de suite. It’s completely free, just reference this how-to guide.

II. Create Your First Score.

Still in the supporter management tab? Click “Add a score” under the scoring menu item.

A “score” -- also called a “scoring algorithm” by people who like syllables -- is a single metric. It’ll generate a single point value, like “0” or “1” or “12.82”, for each of your supporters. That point value is based on a collection of specific rules within the Score: we’ll define those in the next step.

For starters, just give score a name -- say, “super activist score” -- and click “save”. You can use any name you like; the name is never public-facing in any way, but you’ll need it later to query.
You can have as many different scores as you like, so feel free to set up an experimental score or two as you feel your way through the set-up process. It won’t hurt anything in your headquarters.

III. Define Your Score with a Scoring Entry

You’ve created and named a score, but as it stands, it won’t produce any point values.

That’s not too useful. So, click to the score set-up’s second tab, “scoring entries”. Each score is a point value computed on a collection of rules, right? This is the part where you define those rules.

We’re going to start by setting up a score that provides a lifetime count of actions taken by each supporter. Some organizations publish dozens and dozens of actions over a period of years. Nobody takes every action, but people who take many actions are probably more engaged in the issue than people who rarely take action. And we can get that count with just one single scoring entry (i.e., one single rule in our score).

In the “scoring entries” tab, hit “Add a new scoring entry”. You should see the header “add new entry” followed by a bunch of confusing fields. Don’t panic: this is easier than it looks. We’re just going to use three basic fields:

**Reference Name.** As elsewhere in Salsa, this is just a handy descriptive name for you. We could call this scoring entry rule “1 point per action”.

**Object.** The object is the name of the database table the scoring entry rule will examine. Online actions create entries on the supporter action table, so we’ll pick “supporter action” as our object here.

**Multiplier.** The multiplier defines how many points a supporter gets for each entry he or she has. We’re just going to put 1 in this field, meaning “1 point per action taken.”
That's it -- we've got our scoring entry set up! Click “save entry” and you're ready to go.

Every scoring entry must have an object and a multiplier. The other fields on this page are all optional: they'll enable you to do more intricate stuff, but it all starts with the object and the multiplier. And since as little as one single scoring entry can comprise a score, you're looking at a fully armed and operational score right this very minute. Congrats!

IV. Play the Waiting Game

Scores do calculations by sweeping data tables that contain millions of rows.

Alas, that means they can’t be updated to your individual supporters instantaneously: they run intermittently, typically overnight. Treat yourself to a nice dinner this evening for a job well done and come back tomorrow morning to get your hands on your scores.

V. The Morning After

Now that the servers have calculated and populated the scores in the Salsa database, it’s time to use this information!

Scoring is most useful with queries or reports, where you can segment people into groups according to their scoring performance. Our sample score gave one point for every action taken. So, let's search for everybody who has taken a lot of actions.

Build a query. Select the category “scoring”. Then, pick your sample score. We called this “super activist score”, but you might have given it a different name.

Use the final two fields to set up an operator and a condition. If we want frequent action-takers, we might set this query up to search for people with a super activist score greater than or equal to 3.

The beauty of scoring is that it’s personalized to your organization. Maybe you've only run a handful of actions ... and a super activist might be anybody who has done even one of those actions. Maybe you've run hundreds of actions, and you're only interested in people who have taken 10 or more of them. Maybe you want to focus instead on people who have taken zero actions.

Whatever the case, now that the data is there, it's time to start exploring. But at this point, you have the key tools you'll need for scoring. Everything from here on out is an optional variation on the basic concept of counting one point per action.
VI. Adjusting for Recency with Expiration

Our score so far awards one point per action no matter whether the supporter took action yesterday, or five years ago.

That’s potentially useful information, sure. But when you’re considering who on your list is very active, you might really intend to focus only on the most recent actions taken -- for instance, actions within the past year.

Scoring Entries allow you to do exactly this with the Expiration setting.

Enter into the expiration field the number of days after which you’d like a given activity to “sunset.” For example, enter 365 to score only the actions taken within the past year. Now, if your supporter took an action yesterday but took two actions five years ago, her score for actions will be just 1: the two old actions have expired.

With the 365-day expiration setting, you’ve changed your Score from “lifetime count of actions taken” into “count of actions taken within the past year.” Or, set the expiration to 182 for “count of actions taken in the past six months,” or to 730 for “count of actions taken in the past two years.” It’s up to you!

Of course, you might view people who have taken certain actions in the distant past as still somewhat more involved than not at all.
To reflect that, expiration can team up with another optional setting, the minimum value. The minimum value is a value that an old activity will fall to upon expiration -- something other than the default value of zero. So, we might edit our scoring entry that provides 1 point per action and a 365-day expiration with a minimum of 0.1. (All the fields in scoring entries can accept decimal values.)

With this setting, an action more than one year old will be worth 0.1 points, permanently. Our hypothetical supporter with one recent action and two old actions will now score 1.2: one full point for the action taken yesterday, plus 0.1 points apiece for the five-year-old actions that have fallen to the minimum value.

VI. Half-Life

Expiring older scores drop their points abruptly at the expiration date: that year-old action plummets on its 366th day from 1 full point all the way to 0. (Or, to the minimum value.)

Is that one day so critical? Is a 364-day-old action more like a 1-day-old action, or a 366-day-old action?
As an alternative to the sudden expiration, Salsa’s scoring entries can be configured with the half-life field to erode incrementally. With half-life, an action taken loses a tiny bit of its scoring weight with each passing day rather than losing all its value at once.

The number you enter in the half-life field answers the question, “After how many days will the initial scoring award have dwindled to half its original value?” For example: enter 60 in the half-life field, and your 1-point action will be worth 0.5 points after 60 days. After 120 days, the action’s scoring weight will have halved again, from 0.5 to 0.25.

Add new entry

These halvings are only milestones on an exponential decay model straight out of your old chemistry textbook. Each action’s scoring weight actually evolves every single day: the original 1 point will fall to ~0.99 on the very first day after it was taken, and then on to ~0.98 on the second, and so forth. The decay slope will continue indefinitely, eventually approaching zero.

Notice that the number of days set in your half-life field will determine whether your score takes eons to decay, like Uranium-238, or whether it vanishes in the blink of an eye, like Hydrogen-7. A half-life of, say, three days will reduce your initial point award by 99.9% within just one month. If the half-life is 365 days, that point will take 10 full years to dwindle away.
VIII. A Scoring Symphony

So far, we’ve gone pretty far into detail on configuring a single scoring entry. Once you’ve decided to award one point per action taken, you have a variety of ways to tailor that:

- Have that point last indefinitely, giving you a lifetime count of actions
- Have that point stop counting after X days with the expiration field, giving you a count of actions for the past X days
- Have that point dwindle away gradually with the half-life field

This single scoring entry could be enough to make a very useful score.

However, one of the great benefits of scoring is the power to combine multiple measurements into one comprehensive score, and generate an engagement metric that encompasses everything you ask your supporters to do.

So, after you’ve decided just how you want point values for your supporters’ actions to behave, you can set about creating a second scoring entry for a different form of supporter engagement -- let’s say, donations.

A score can comprise as many distinct scoring entries as you wish: the overall score for each supporter is just the sum of the scoring entries.

And each different scoring entry can have its own multiplier, its own expiration, its own half-life. If just signing an online petition is worth one point, what’s making a donation worth? Five points? Ten points? Will it remain an indicator of engagement for several years before you expire it? It’s all up to you.

Edit Score
How To Set Up Scoring In Salsa

The overall score will take shape from choice to include different types of activities as scoring entries, and to the relative weights you assign to those activities: a score that counts lifetime actions taken and nothing else will produce a very different result from a score that includes donations at ten points a pop.

And that's just the idea. Different scores can produce different ways of looking at your list, different opportunities to unearth hidden value for your organization ... and a whole lot of traffic on your engagement ladder, pyramid or staircase.

For more information about using Salsa, or to interact with other stellar users, visit Salsa Commons at help.salsalabs.com.

About Salsa

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