

REVIEW OF VAN TRAINING

Offered at PCD Coolidge office

Thursday, November 21, 2019

Chris Kurent, Trainer extraordinaire

Review created by Janell Alewyn

TIP:

If you have any questions about some features of the VAN, just look for [Help Wiki](#) in the upper right hand corner of the VAN screen

These are helpful, step-by-step tutorials focused on the feature you are using at the time.

NOTE: The [Help Wiki](#) link is very small and easy to miss.

DISCLAIMER:

The person creating this PowerPoint is NOT an expert in the VAN or MiniVAN.

I have simply tried to record what I learned at a recent workshop.

Please contact Janell Alewyn if you find any errors herein – azlibrarian@protonmail.com

Also the authority for all this is

Chris Kurent

ckurent@azdem.org

480-401-9373

Please limit your contact with Chris so that he is not inundated.

He is very able and willing to help, but there are hundreds of US and only one of HIM.

Try to resolve any usage problems by consulting the Help Wiki or other Pinal County Democrats who may be skilled in the use of the VAN and MiniVAN before contacting Chris (unless it is an access issue).

You may also contact me and I will help if I can.

LOG IN TO THE VAN (VOTER ACTIVATION NETWORK)

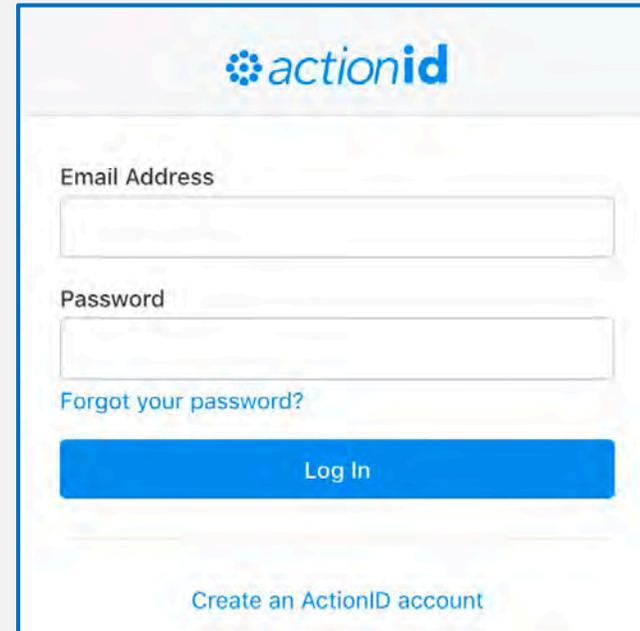
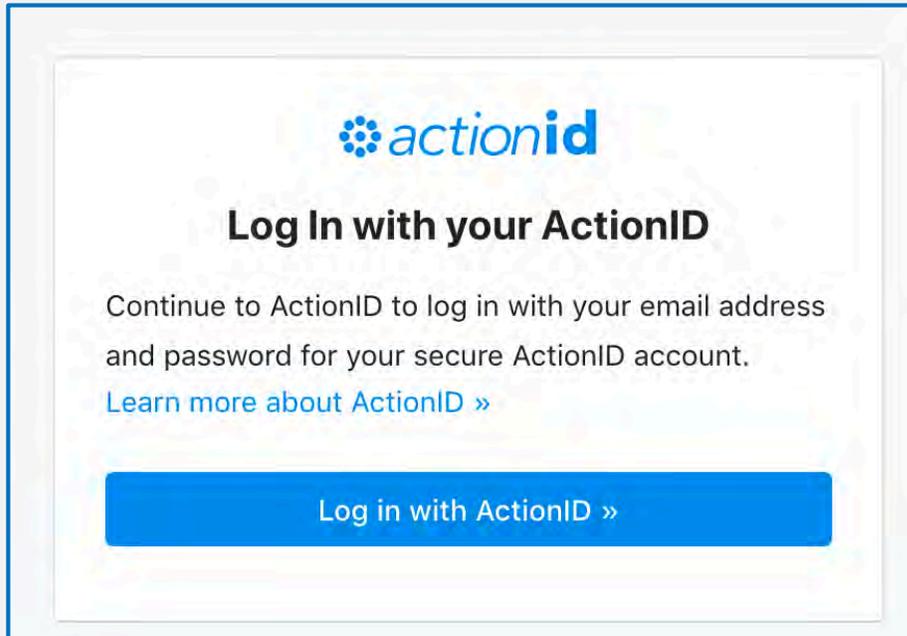
Log in using the following URL

- <https://adp.securevan.com> (preferred)

Alternate point of access if that fails:

- <https://votebuilder.com>

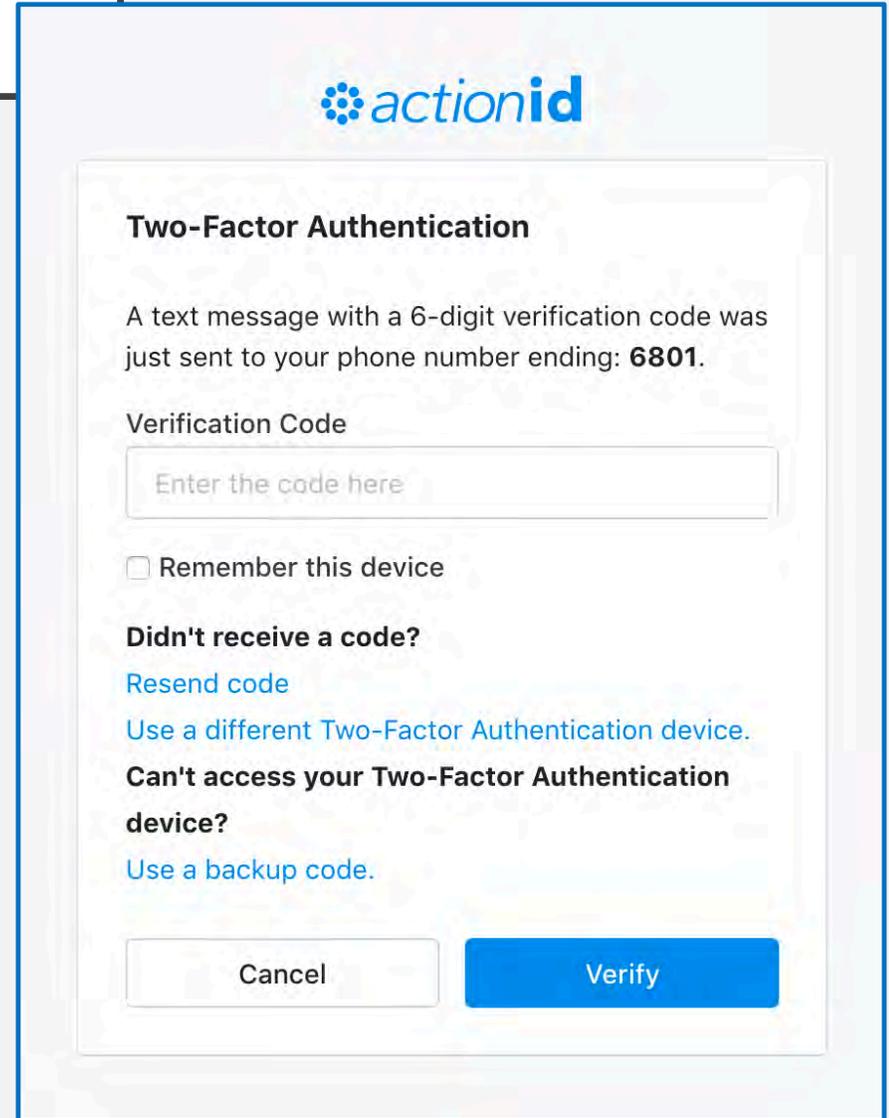
LOG IN WITH ACTIONID



First, click “Log in with ActionID,” then enter your email and password to log in.

YOU WILL GET A VERIFICATION CODE
TEXTED TO YOUR CELLPHONE

Enter the 6-digit verification code and click Verify



The screenshot shows the ActionID Two-Factor Authentication interface. At the top is the ActionID logo. Below it is the title "Two-Factor Authentication". The main text states: "A text message with a 6-digit verification code was just sent to your phone number ending: **6801**." There is a text input field labeled "Verification Code" with the placeholder text "Enter the code here". Below the input field is a checkbox labeled "Remember this device". Underneath, there are two sections for troubleshooting: "Didn't receive a code?" with a "Resend code" link, and "Can't access your Two-Factor Authentication device?" with a "Use a backup code." link. At the bottom, there are two buttons: "Cancel" and "Verify".

 **actionid**

Two-Factor Authentication

A text message with a 6-digit verification code was just sent to your phone number ending: **6801**.

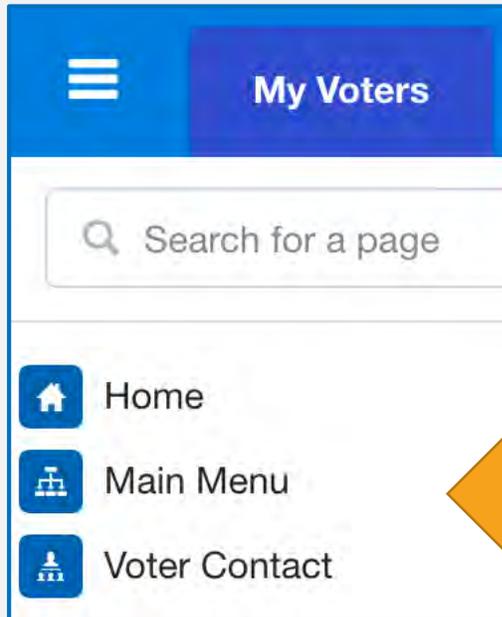
Verification Code

Remember this device

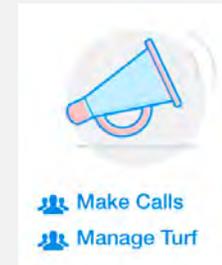
Didn't receive a code?
[Resend code](#)

Can't access your Two-Factor Authentication device?
[Use a backup code.](#)

This should take you to the main screen.
Make sure that you are in My Voters
(not My Campaign).



If you see the screen with the bullhorn,
just click on Main Menu at the left of
the screen. That should take you to
the screen shown on the next slide.





Search for a page

- Home
- Main Menu
- Voter Contact

PEOPLE

- Create a List
- My Folders
- My List (53 People)
- Quick Look Up

The sections you will use most often are: **Create a List**
Quick Look Up

MAIN MENU

Welcome Janell

My Requests	0
My Export Files	0
My PDF Files	0
Counts/Crosstabs Outputs	0
Follow Ups	7
Support Requests	0
Contact the Admin	

QUICK LOOK UP

Use this when you want to look up a voter by name, address, VANID, email, phone.

You can search even if you only have partial information. Say someone signed a petition and you can only read the first few letters of the first and last name. Try that as a search with the zip code.

This very abbreviated search of Last Name **ale** and First Name **ja** with zip code **85128** will bring up my voter record in VAN. Of course, you will usually have much more detailed information to search with, but this truncated search option is a powerful feature of the database.

The screenshot shows a web form titled "CONTACTS Quick Look Up". The form contains several input fields: "Last Name" (with "ale" entered), "First Name" (with "ja" entered), "Middle Name", "Nickname", "Phone", "DOB", "Voter File VANID", "Street Address", "City" (a dropdown menu), "Zip" (with "85128" entered), "Email", and "County" (a dropdown menu). There is a checkbox labeled "Use SmartName search technology" which is checked. At the bottom right, there are three buttons: "Remember Filters", "Clear", and "Search".

NOTE: You may have to scroll down to see the results of a search.

CREATE A LIST

Click on Create a List (left-hand frame or center of Main Menu)

Use this to create a list of voters that meet certain criteria – such as district, precinct, party affiliation, voting history (and more).

This list can later be downloaded as a walk list for canvassing or a call list for phone banking.

CONTACTS

Create A New Search

Step 1: (Start with anyone who meets the selected criteria)

Scroll down to Home Districts and select a county from the drop down menu. (You must select county before you can select a precinct). Then select a precinct you want to create a list for. You may want to limit the results to voters of a certain political party. For example, I searched Home Districts for Pinal County Precinct 21, then I searched Party Democrats. You can get an early preview of the results of your search by clicking on Preview My Results. My search yielded 243 people.

← Step 1: New Search

Party
Party = Democrat

Districts
Precinct = 021 Central Arizona College
and County = Pinal

Voter Status
Registration Status = Registered Active

Suppressions
exclude Deceased
and include Good Voting Address only
and include Good Mailing Address only
and exclude Do Not Walk
and exclude Do Not Call
and include Do Not Text
and include Do Not Email
...less

Preview My Results

+ 243 People

Note the built-in Suppressions. You can change these, if needed, but, in most cases, you will want to keep these as is to limit your results.

TIP:

The “Preview My Results’ feature is a handy shortcut for compiling numerical lists.

For example, I use this feature to get quick data for the numbers of voters in my precinct who are

	VOTERS	2019 (MAR)	2018 (DEC)	2019 PEVLs	2019 Female	2019 < 36 yrs
Democrats	Democrats	244	217	173	133	32
Republicans	Republicans	348	338	264	167	44
Independents (Other)	Independents	256	243	156	100	84
PEVL voters						
Female						
Under 36	TOTALS	848	798	593	400	160

It allows me to track changes in registrations (e.g., Dec 2018 vs Mar 2019) by party. In the 3-month period between Dec 2018 and March 2019, there were more newly registered Democrats than any other party (in my precinct). 👍

It also allows me to quickly calculate what percentage of my voters are Democrats, female, PEVL, etc.

Just run a report, click Preview My Results, and collect the numbers. No need to run the full reports if all you need are the statistics.

> Activist Codes
> Addresses
> Age • Registration Date
> Canvass Status
> Custom Regions
> Early Voting
> Email
> Home Districts
> Household Party Counts
> Household Sex Counts
> Likely Ethnic Subgroup

> Likely Ethnicity
> Likely Religion
> My Campaign Record
> My Saved Lists
> Name
> Neighbor to Neighbor
> Notes
> Occupation
> Organizing Turfs
> Party
> Permanent Absentee

> Phones
> Polling Location
> Relationships
> Scores
> Self-Reported Demographics
> Sex (Source File)
> Suppressions
> Survey Questions
> Targets
> Voter Status and Voter Registration
> Voting History

In addition to Party and Home District, these are the other available limits you can set on your searches.

We will look more closely at some of these later in this presentation.

Not all of these fields have data. For example, there is not much available under Occupation, and only some voters have shared their phone numbers and/or email addresses.

Also, **DO NOT** rely on the data about ethnicity or religion. This is not reliable at this time.

RUN SEARCH

◀ Step 1: New Search

Party
Party = Democrat

Districts
Precinct = 021 Central Arizona College
and County = Pinal

Voter Status
Registration Status = Registered Active

Suppressions
exclude Deceased
and include Good Voting Address only
and include Good Mailing Address only
and exclude Do Not Walk
and exclude Do Not Call
and include Do Not Text
and include Do Not Email

...less

🔍 Preview My Results

+ 243 People

+ Add Step

▶ Run Search

This will run the search and yield a report that lists the 243 people that meet the criteria I asked for – Pinal County, Precinct 21, Democrats.

At the top of the report (see next slide) you will see the number of

People
Home Phones
Preferred Phones
Doors
Mailboxes

followed by the list of voters, arranged alphabetically by last name. You can later sort the list by other criteria, such as address.

CONTACTS

My List

243 People 178 Home Phones 195 Preferred Phones 162 Doors 168 Mailboxes

Print Labels Calls MiniVAN Counts Reports Cut Turf Split Grid Script Form Map

Name Address City Phone Age Prec

Name	Address	City	Phone	Age	Prec
Allen, Mitchell	624 Westwood St	Coolidge	(520) 723-0000	80	21
Anderson, Celia	17208 Willow WayE	Casa Grande	(520) 836-0001	56	21
Apodaca, Julio	3331 Ginger Court	Casa Grande	(520) 868-1234	36	21
Bell, Jessica	454 W Warner Rd	Coolidge	(928) 864-0000	19	21
Bianco, Leo	12569 Cactus Ave	Casa Grande	(909) 435-0000	44	21
Castillo, Anita V.	343 N Pinto Dr	Coolidge	(520) 723-0010	71	21

NOTE: To protect voters' privacy, this is a simulated list. Names, addresses, ages, and phone numbers are fictitious.

CUT TURF

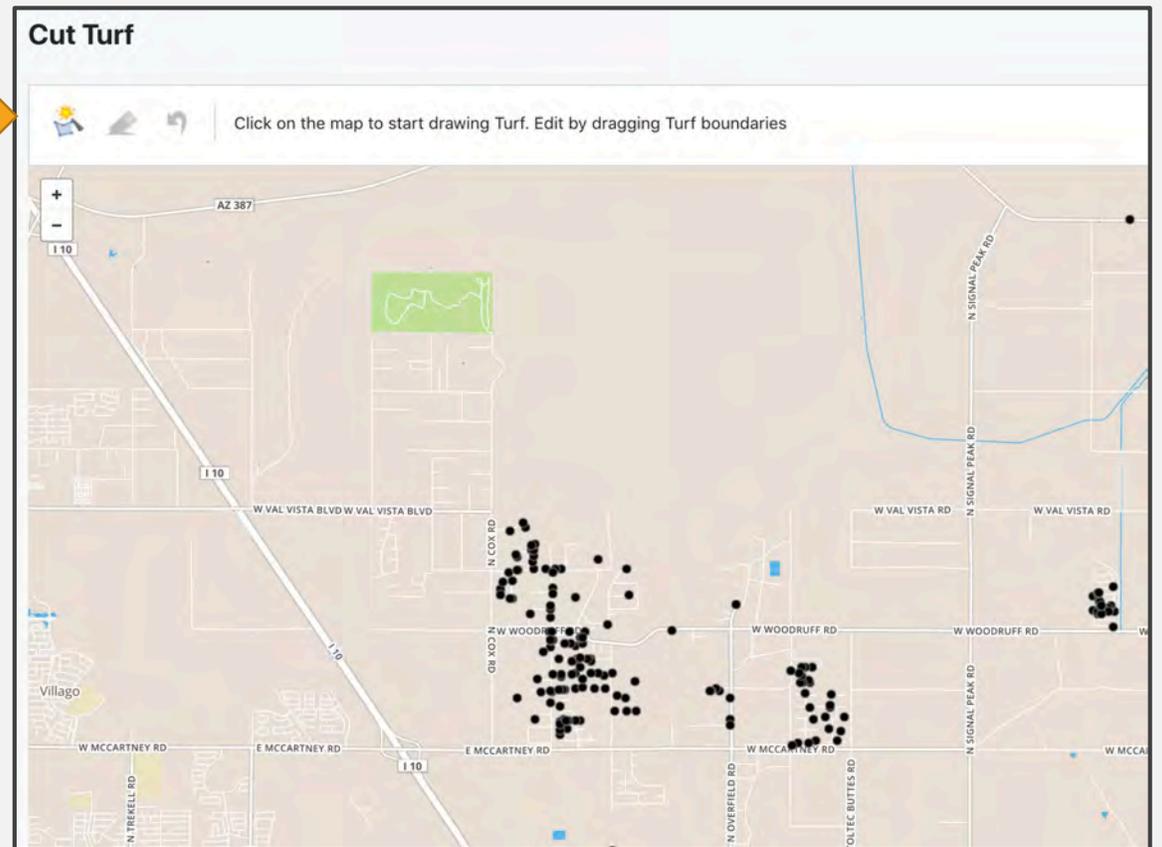
To cut turf means to divide up the voters on your list into manageable chunks so that volunteers can walk (or call) a subset of the total.

Click the icon “Cut Turf”



(on your My List screen). This will lead to an image similar to that shown to the right..

This displays a map with dots showing where your voters live.



To automatically cut turf, click the magic wand icon in the upper left of the map and select how many ways you want the map cut. I selected 6 and got the map shown on the next slide, which divided the 243 voters into six blocks of about 40 each.

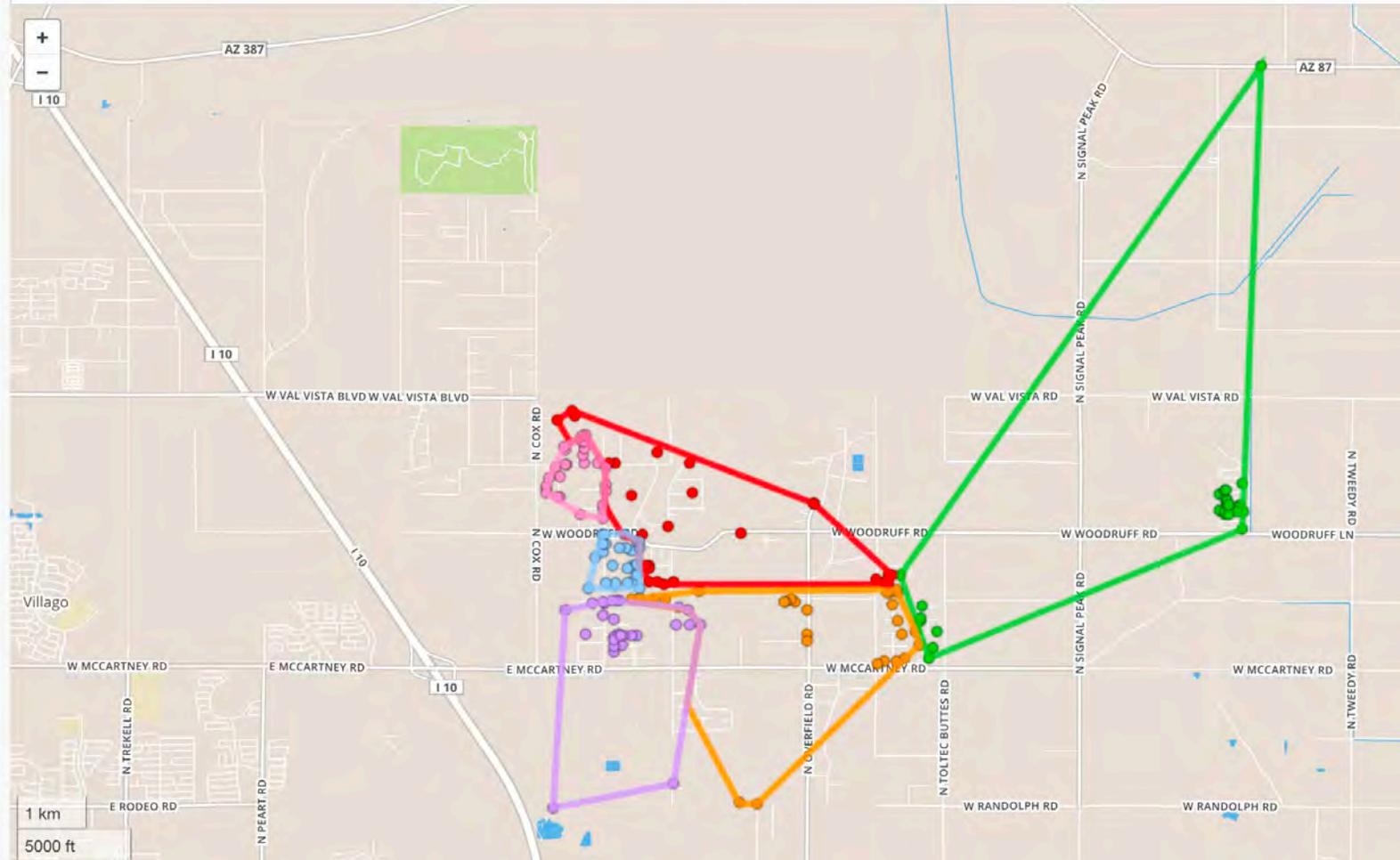
You can also manually divide the map by clicking and dragging to create or edit the boundaries.

Cut Turf

Coolidge pct 21



Click on the map to start drawing Turf. Edit by dragging Turf boundaries



At this point, click Save and Finish.

Create a Folder in which to save your reports and give the report a name – e.g., I named this list Coolidge Precinct 21 and put it in a folder named Walk Lists 2019

You can later find your saved lists under My Folders and under My Turfs (left frame of screen)

When you click Save My List, you have two choices – to save it as a static or a dynamic list.

LIST

Save My List

☰ Saved List
Saved Lists consist of a static list of contacts.

C Saved Search
Saved Searches consist of a dynamic list of contacts. Saved Searches are automatically updated.

Save

© 2019 NGP VAN - [Privacy Policy](#)

At the left of the screen, go to My Turfs and select the turf you want to work with.

Click the check box(es) next to the Turf you want
In the upper right of the screen, click on Quick Actions
Click Generate List Number

Complete the information on the next screen

Report Format (Calling list or Walking list)

Script (select a script from the list or request a customized script from Chris Kurent)

MiniVAN campaign – Reaching Out or ...?

Select desired sort order – You probably don't need the county and precinct unless you are working with more than one, so change those to what you need.

One useful order is

Street Name (Ascending)

Street Number (Ascending)

Odd/Even (Ascending)

Apartment

The screenshot shows a web interface for configuring a list. At the top, there is a button labeled "Clear Sort Order". Below it, there are four rows of sorting options, labeled "Sort Order1" through "Sort Order4". Each row consists of a dropdown menu for the sort key, radio buttons for "Asc" and "Desc", a checked checkbox for "Show Group Header", and an unchecked checkbox for "Page Breaks".

Sort Order	Sort Key	Asc	Desc	Show Group Header	Page Breaks
Sort Order1	Street Name	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sort Order2	Street Number	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sort Order3	Odd/Even	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sort Order4	Apartment	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Once you have made your selections, you can Print the list or click “Generate List Numbers” to send the information to MiniVAN. **TIP:** Don't click Page Breaks if you don't want to print partial pages with just a few names on each page.

Depending on the time of the year, you may also want to apply some field limits (available at the bottom of the list) such as “Exclude Anyone Who Has Early or Absentee Voted”

Or perhaps you are involved with a GOTV effort and you are running a list on election day, in which case you may want to “Exclude Anyone Who Has Voted on Election Day” so you can identify those voters that you want to remind to vote.



The image shows a screenshot of a software interface with a white background. At the top left, there is a grey header area containing the text "Include Field Labels". Below this header, there is a list of three items, each with a small square checkbox to its left. The items are: "Print Early Vote Location Cover Sheet", "Exclude Anyone Who Has Early or Absentee Voted", and "Exclude Anyone Who Has Voted on Election Day". All checkboxes are currently unchecked.

- Print Early Vote Location Cover Sheet
- Exclude Anyone Who Has Early or Absentee Voted
- Exclude Anyone Who Has Voted on Election Day

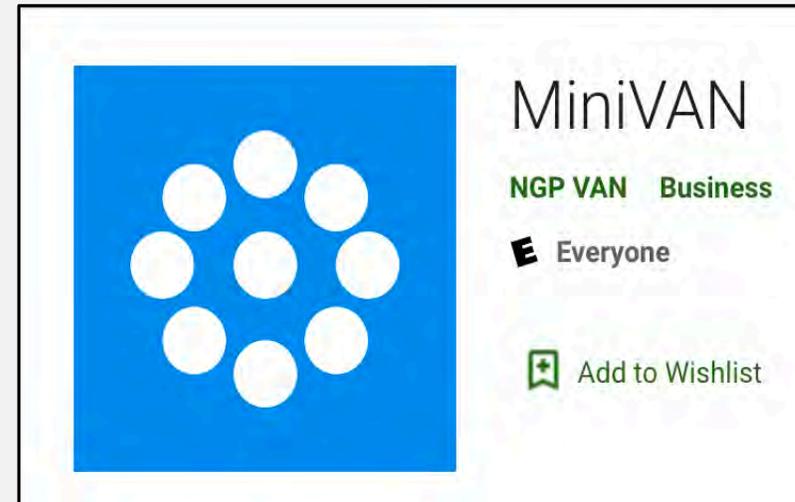
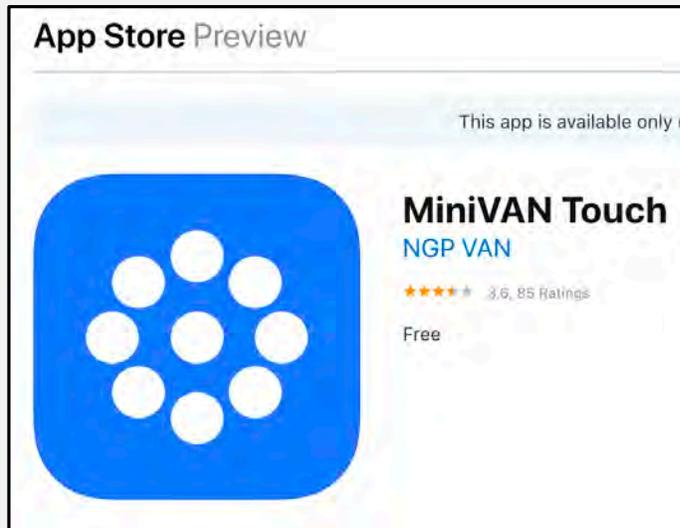
USING MINIVAN

MINIVAN is a handy tool on your cellphone that you can use when canvassing. Everything you need to locate and talk to voters is at your fingertips, along with the tools to record the interaction (or the failure to contact).

DOWNLOAD MINIVAN APP TO YOUR CELL PHONE

For iPhones <https://apps.apple.com>

For android phones. <https://play.google.com>



VISIT THE MINIVANUAL
42-PAGE GUIDE TO USING MINIVAN

[HTTPS://TINYURL.COM/MINIVANUAL](https://tinyurl.com/minivanual)

For the six turfs I cut, I receive six MiniVAN numbers.

<input type="checkbox"/> Coolidge pct 21	Walking Lists 2019	243	162	
<input type="checkbox"/> Coolidge pct 21 Turf 01	Walking Lists 2019	38	27	31553373-64515 Generated: 11/24/19 1:12 PM
<input type="checkbox"/> Coolidge pct 21 Turf 02	Walking Lists 2019	41	27	31553374-91346 Generated: 11/24/19 1:12 PM
<input type="checkbox"/> Coolidge pct 21 Turf 03	Walking Lists 2019	42	27	31553375-19133 Generated: 11/24/19 1:12 PM
<input type="checkbox"/> Coolidge pct 21 Turf 04	Walking Lists 2019	37	27	31553376-33339 Generated: 11/24/19 1:12 PM
<input type="checkbox"/> Coolidge pct 21 Turf 05	Walking Lists 2019	44	27	31553377-53208 Generated: 11/24/19 1:12 PM
<input type="checkbox"/> Coolidge pct 21 Turf 06	Walking Lists 2019	41	27	31553378-38469 Generated: 11/24/19 1:12 PM

Click on the walking list(s) you want, then click on Quick Actions (upper right of screen) and select Send to MiniVAN.

This will bring up the following screen. Fill in the boxes and click Finish.

Send Turf to MiniVAN

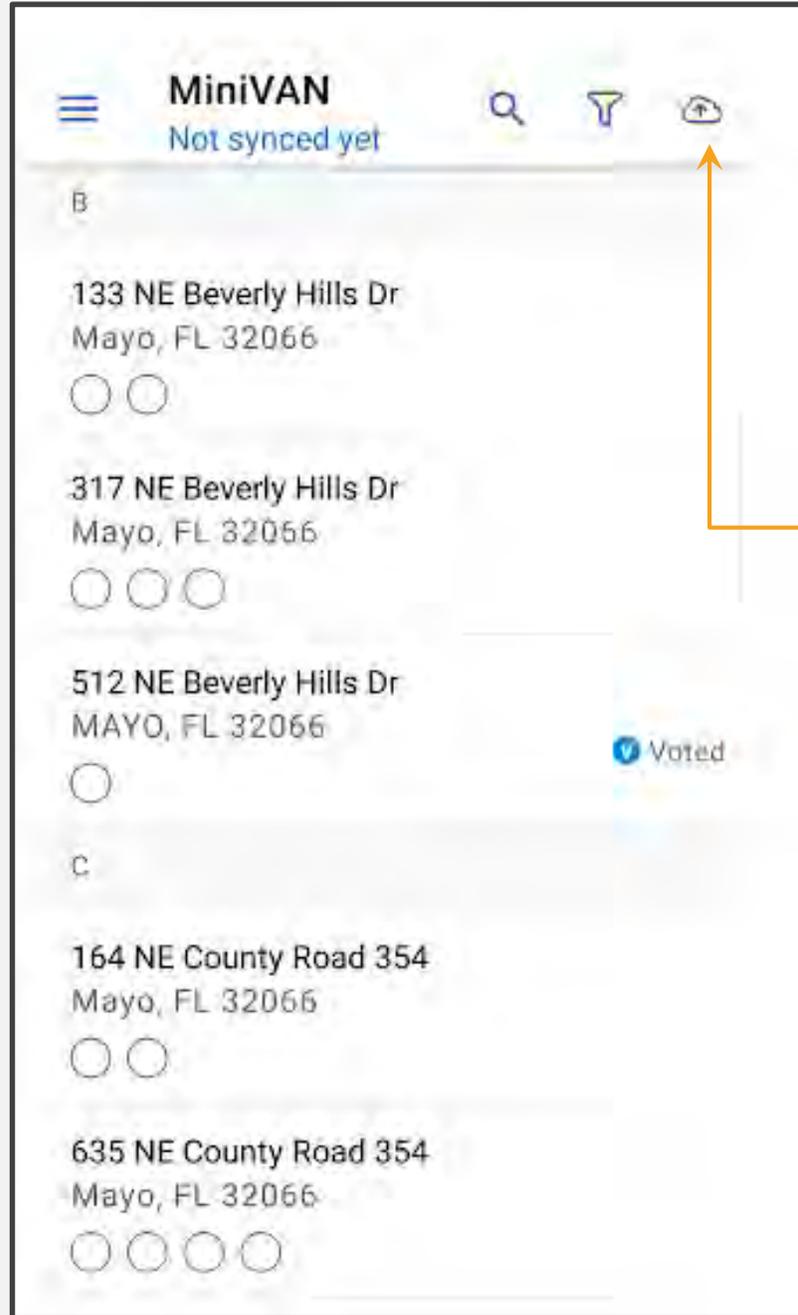
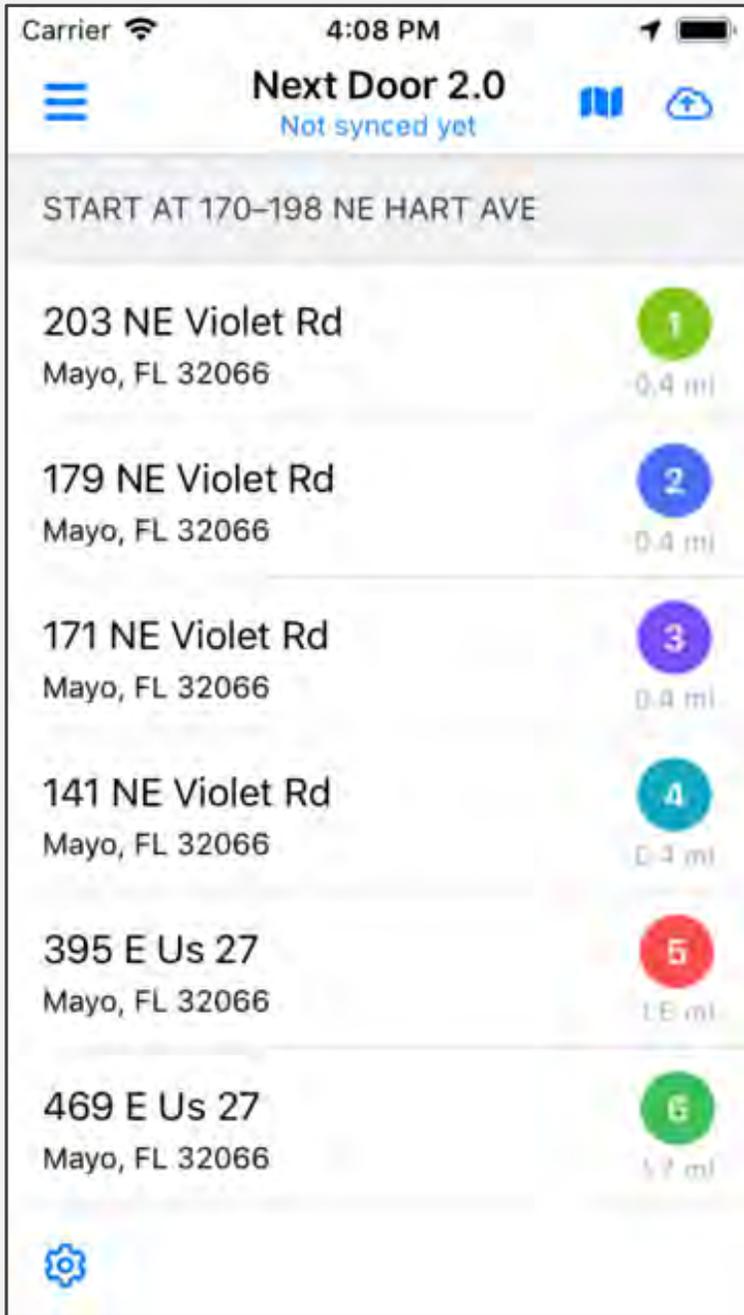
Select a MiniVAN Campaign to set up the Format and Script that will be used by your MiniVAN canvasser(s).

MiniVAN Campaign: Reaching Out

Turf	List Name (Shown on Device)	Canvasser(s)
Coolidge pct 21 Turf 01	Coolidge pct 21 Turf 01	Alewyn, Janell

Cancel Finish

Open the MiniVAN app on your phone. You will see a screen similar to the images on the next slide.



You will have at your fingertips, a lot of information about each voter: age, gender, party. Click on Details to see more: their voting history, whether they are on the PEVL, their polling place, their early voting site, and more.

The bubbles under their address indicate how many people live at that house.

As you canvass, click the sync icon in the upper right (a cloud with an up arrow) to save data.

Fill in their answers to the script questions -- or click I couldn't reach this contact and select the reason from the list.

Here are the more common codes used to indicate a non-contact event

Canvass Results Key		
Not Home = NH	Inaccessible = IN	Moved = MV
Refused = RF	Deceased = DC	Spanish = SP

IMPORTANT: Sync the data as you canvass. At the end of the day, go online (not on your phone but on a desktop or laptop computer), and click MiniVAN commit.

You will find this in the center of the Main Menu and also in the left-hand frame with the other ORGANIZING options. [purple icons]



SOME COOL THINGS
THAT CHRIS KURENT
TAUGHT US

The following slides will show some of the customized reports you can create in the VAN, such as:

- A list of “Other” (Independent) voters likely to vote Democratic
- A list that will identify voters who are potential volunteers and/or new PCs
- A list of voters who are unlikely to vote (so you can target them with reminders)

INDEPENDENT VOTERS WHO ARE LIKELY TO VOTE DEMOCRATIC

The screenshot shows a 'Scores' section with a dropdown arrow. Below it, the text 'Democratic National Committee (5 Scores)' is displayed. There are five rows, each with a category name, an information icon, and two input fields for 'to' and 'from' values. The '2018 DNC Dem Support' row has '70' in the 'from' field and '100' in the 'to' field. The other rows have '0.00' in both fields.

Category	From	To
2020:DNC Volunteer Propensity Overall	0.00	100.00
2020:Civis Spanish Language Preference	0.00	100.00
2018 DNC Dem Support	70	100
2018:Civis Turnout	0.00	100.00
2018: DCCC/DGA Clarity National Turnout	0.00	100.00

To create this report you will need to use the SCORES field limit.

From Main Menu, click Create a List.

From Home Districts, select the county, then the precinct, you want to use.

From Party, select Other

From Scores, select one of the five options.

For example, try this:

2018 DNC Dem Support and fill in the scores as 70 to 100 (see screenshot at left)

This will generate a list of Independent (Other) voters who are likely to vote for Democrats.

DEMOCRATIC VOTERS WHO ARE LIKELY TO VOLUNTEER OR BECOME PCS

The screenshot shows a web interface with a 'Scores' section. Underneath, it says 'Democratic National Committee (5 Scores)'. There are five rows, each with a score name and two input boxes for a range. The first row is '2020:DNC Volunteer Propensity Overall' with values '70' and '100'. The other four rows are '2020:Civis Spanish Language Preference', '2018 DNC Dem Support', '2018:Civis Turnout', and '2018: DCCC/DGA Clarity National Turnout', all with values '0,00' and '100,00'. Each row has a question mark icon to its right.

Score Name	From	To
2020:DNC Volunteer Propensity Overall	70	100
2020:Civis Spanish Language Preference	0,00	100,00
2018 DNC Dem Support	0,00	100,00
2018:Civis Turnout	0,00	100,00
2018: DCCC/DGA Clarity National Turnout	0,00	100,00

Again, to create this report you will need to use the SCORES field limit.

From Main Menu, click Create a List.

From Home Districts, select the county, then the precinct, you want to use.

From Party, select Democrat

From Scores, select

2020 DNC Volunteer Propensity Overall

and enter scores of 70 to 100

(see screenshot at left)

This will generate a list of Democratic voters who may be persuaded to volunteer and/or become PCs.

Experiment with different numbers to see how the results change and to find an optimal score for your needs.

DEMOCRATIC VOTERS
WHO ARE LIKELY TO
VOLUNTEER OR BECOME PCS
(ALTERNATE APPROACH)

The screenshot shows a web interface with a 'Scores' section. Underneath, it says 'Democratic National Committee (5 Scores)'. There are four rows of filters, each with a label, a value input box, and a range input box. The first row is '2020:DNC Volunteer Propensity Overall' with a value of '0.00' and a range of '0.00' to '100.00'. The second row is '2020:Civis Spanish Language Preference' with a value of '0.00' and a range of '0.00' to '100.00'. The third row is '2018 DNC Dem Support' with a value of '60' and a range of '60' to '100'. The fourth row is '2018:Civis Turnout' with a value of '75' and a range of '75' to '100'.

Score Name	Value	Range
2020:DNC Volunteer Propensity Overall	0.00	0.00 to 100.00
2020:Civis Spanish Language Preference	0.00	0.00 to 100.00
2018 DNC Dem Support	60	60 to 100
2018:Civis Turnout	75	75 to 100

This is another means to identify potential volunteers and/or future PCs.

From Main Menu, click Create a List.

From Home Districts, select the county, then the precinct, you want to use.

From Party, select Democrat

From Scores, select

2018 DNC Dem Support with scores 60 to 100 plus Turnout scores of 75 to 100

(see screenshot at left)

This will generate a list of Democratic voters who show strong support and reliable turnout for elections. These voters may be persuaded to volunteer and/or become PCs.

Experiment with different numbers to see how the results change and to find an optimal score for your needs.

DEMOCRATIC VOTERS WHO ARE UNLIKELY TO VOTE (LOW VOTER TURNOUT HISTORY)

Include anyone who did	of the following
<input checked="" type="checkbox"/>	2018 General <input type="radio"/> Voted <input checked="" type="radio"/> Didn't Vote <input type="radio"/> At Polls <input type="radio"/> Early
<input checked="" type="checkbox"/>	2016 General <input type="radio"/> Voted <input checked="" type="radio"/> Didn't Vote <input type="radio"/> At Polls <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Provisional
<input checked="" type="checkbox"/>	2014 General <input type="radio"/> Voted <input checked="" type="radio"/> Didn't Vote <input type="radio"/> At Polls <input type="radio"/> Early <input type="radio"/> Provisional
<input checked="" type="checkbox"/>	2012 General <input type="radio"/> Voted <input checked="" type="radio"/> Didn't Vote <input type="radio"/> At Polls <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Provisional
<input type="checkbox"/>	2010 General <input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Early
<input type="checkbox"/>	2008 General <input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Early

I use this strategy to identify voters in my precinct who never vote in Presidential Preference elections (or Primary elections) so I can send them a reminder to vote on March 17 (or August 4).

To create this report you will need to use the VOTING HISTORY field limit.

From Main Menu, click Create a List.

From Home Districts, select the county, then the precinct, you want to use.

From Party, select Democrat

From Voting History field, decide on your criteria. You can select "Include anyone who did ..."

ANY or ALL or AT LEAST or EXACTLY or NO MORE THAN as a limit.

For example, try this:

2018 General Didn't Vote

2016 General Didn't Vote

2014 General Didn't Vote

2012 General Didn't Vote

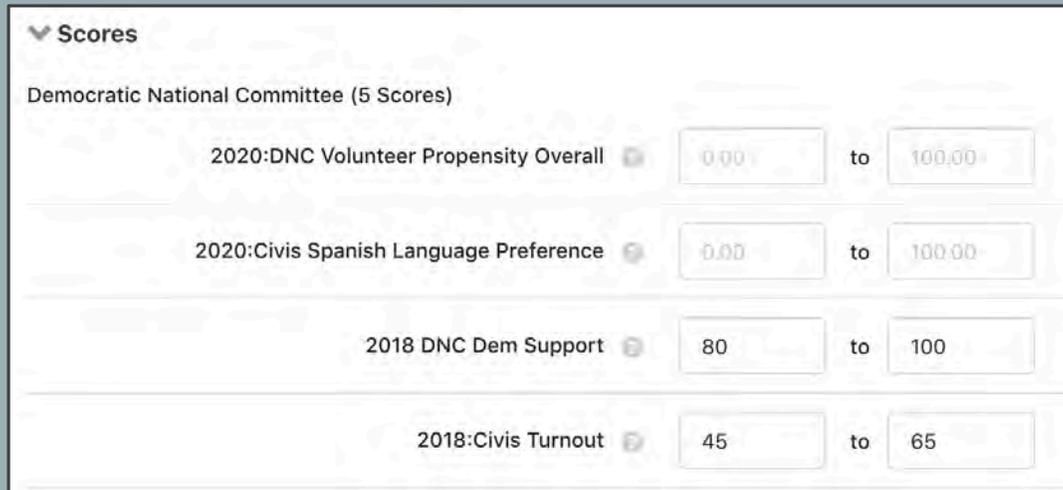
(see screenshot at left)

This will generate a list of registered Democrats who seldom vote. You may want to make the criteria less restrictive to get people who occasionally vote.

Besides General, other options include Primary elections, Presidential Primary, Special, Municipal, and Recall elections.

Click on "Preview My Results," and then, if you want the report, click on "Run report."

DEMOCRATIC VOTERS WHO ARE UNLIKELY TO VOTE (ALTERNATE STRATEGY)



▼ Scores

Democratic National Committee (5 Scores)

2020:DNC Volunteer Propensity Overall	0.00	to	100.00
2020:Civis Spanish Language Preference	0.00	to	100.00
2018 DNC Dem Support	80	to	100
2018:Civis Turnout	45	to	65

To create this report you will need to use the SCORES field limit.

From Main Menu, click Create a List.

From Home Districts, select the county, then the precinct, you want to use.

From Party, select Democrat

From the SCORES field, decide on your criteria.

For example, you might limit to voters with high Dem Support scores and low Turnout scores.

Click on “Preview My Results,” and then, if you want the report, click on “Run report.”

TIP:

Be alert to details that may show WHY a voter has not voted regularly, such as:

Age – voter has not been of voting age long enough to establish a voting history

Registration date – perhaps the voter has not lived in Arizona long enough to establish a voting history

You can find both data points (age and registration date) under Vital Stats & Contact Preferences

QUESTIONS? ERRORS? OMISSIONS?

Please contact Janell Alewyn at
azlibrarian@protonmail.com
and put REVIEW of VAN PPt in subject line

Edited December 2, 2019