

WELCOME TO VAN LIST CRITERIA TRAINING

This is an interactive class!

- ✓ Please make sure that you are logged-in to VAN and have something to take notes on/ with
- ✓ The Slides will have both written & picture information, in addition to verbal presentation & discussion, if you need accommodations, please send me a private chat before we begin
- ✓ Please use the hand raise function &/or type questions in chat as they pertain to an instruction area, please hold SPECIFIC questions until the end.
- ✓ The class plan is for 90minutes of instruction & approx. 30min. of specific Q&A (at the end)



VAN LIST CRITERIA -

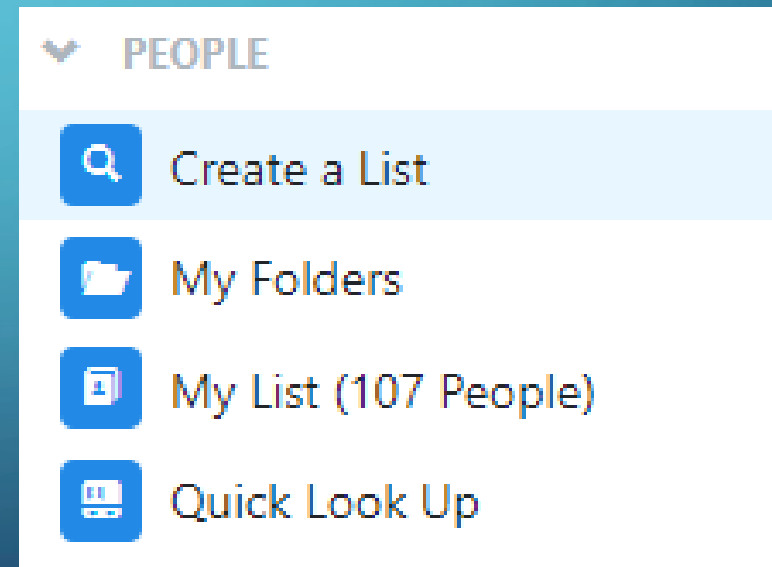
A REVIEW & INTERACTIVE TRAINING FOR VAN ON HOW
TO CREATE EFFECTIVE AND SELECTIVE VOTER LISTS

EXPECTED OUTCOMES:

- ❖ SELECTION CRITERIA – VOCABULARY & OVERVIEWS
- ❖ HOW TO NAVIGATE LIST CREATION
- ❖ HOW TO CUT TURF
- ❖ HOW TO “PUSH” A LIST TO PAPER & MINIVAN

WHY DOES CRITERIA MATTER?

- Contact Info for Voters
- Effective & Efficient use of Criteria makes PO's job easier
- Outreach can be VERY Specific/ Broad
- DATA, DATA, DATA!
- Cut-Turf & Delegation
- Update Voter Details
- Candidate Support



CRITERIA — WHAT MATTERS FOR YOUR LIST?

CONTACTS

Create A New Search

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

FAVORITES

> Home Districts



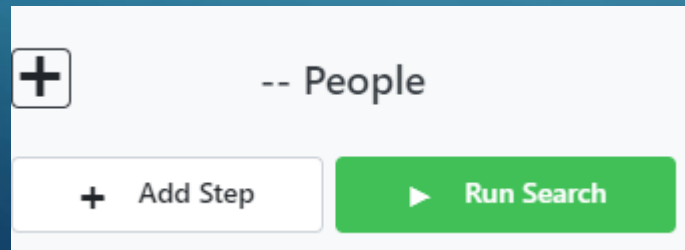
Criteria Choice	Selection Outcomes
Home Districts	Your Precinct (pre-assigned), may also have access to the County
Suppressions	contact method(s), avoid unwanted contact, "Deceased"
Party	REGISTERED AS "Party"
Voter Status & Voter Registration	Active vs Inactive

PRACTICE – BASIC LIST

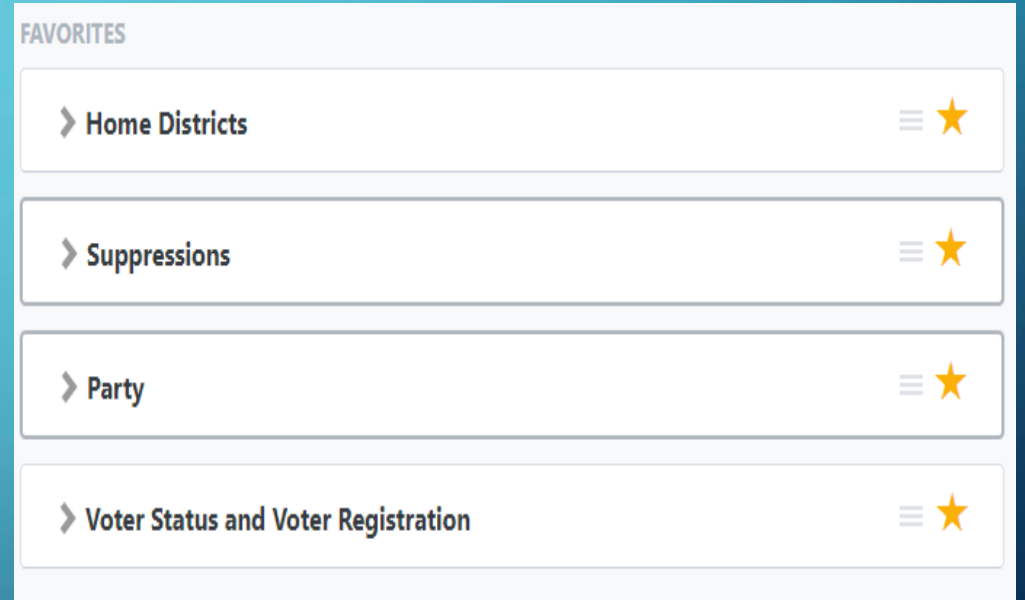
Create a list from your precinct that uses the following CRITERIA

- 1) Your Precinct
- 2) Include: Good Voting & Mailing Address
- 3) Exclude: Deceased, Do Not Call, Do Not Text
- 4) Include: Walkable People, Do Not Walk, Do Not Email, Do Not Mail
- 5) Registered Democrats
- 6) Active Registration

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RUN SEARCH



A screenshot of a search interface. At the top left is a plus sign icon in a square. To its right is the text "-- People". Below this, there are two buttons: a white button with a plus sign and the text "Add Step", and a green button with a play icon and the text "Run Search".



A screenshot of a "FAVORITES" section. It contains four items, each with a right-pointing chevron, the item name, a hamburger menu icon, and a yellow star icon. The items are: "Home Districts", "Suppressions", "Party", and "Voter Status and Voter Registration".

# SAVING YOUR LIST – 2 WAYS

## SAVE AS A LIST


- \* STATIC, DATA WILL NOT UPDATE
- \* COMPARISON FOR FUTURE
- \* PRACTICE LISTS


## SAVE AS A SEARCH

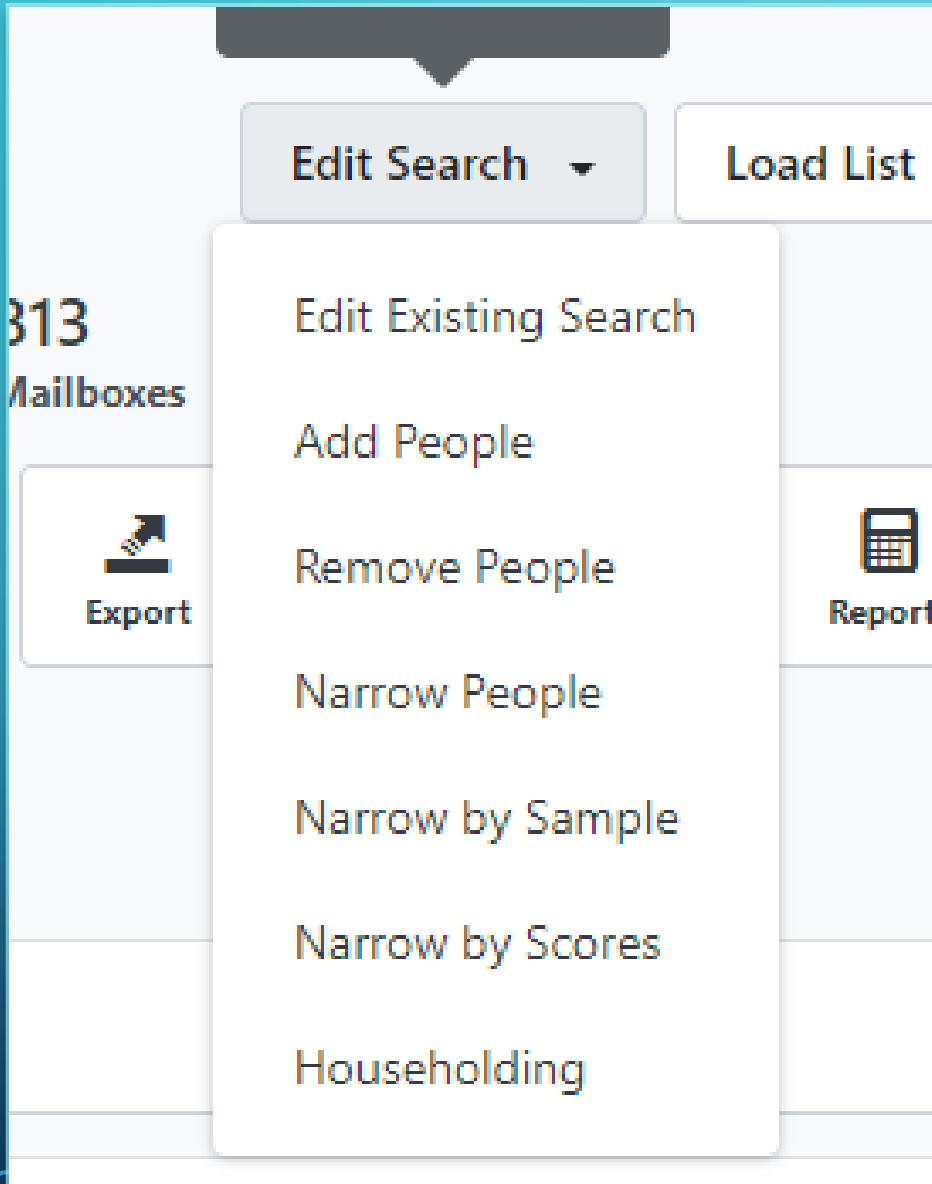
- \* DYNAMIC, UPDATES EACH RUN
- \* “NEW” EVERY TIME
- \* REPEATABLE OUTCOMES

LIST

### Save My List

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

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



## EDIT SEARCH

- Use the list you've created and amend the criteria without starting over
- See the changes you've made
- Add/ Remove criteria choices easily

# CRITERIA — NARROWING DOWN YOUR LIST

CONTACTS

## Create A New Search

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

| Criteria Choice                | Selection Outcomes                                                    |
|--------------------------------|-----------------------------------------------------------------------|
| <b>Activist Codes</b>          | Participation Tags by “Event”, i.e. Caucus attendee, Delegate, etc.   |
| <b>Likely Party</b>            | Based on actions, a voter’s party affiliation, can be used with PARTY |
| <b>Age * Registration Date</b> | Selections by DOB (under/over groups) or Voter Registration date      |
| <b>Phones</b>                  | Choose the contact “phone” – texts & calls                            |
| <b>Voting History</b>          | Who voted or didn’t vote in the last several elections                |

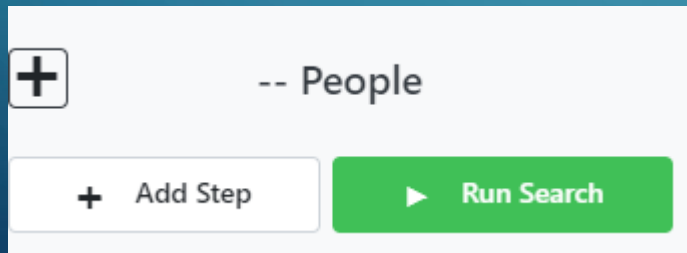


# PRACTICE – ACTIVE UNAFFILIATED

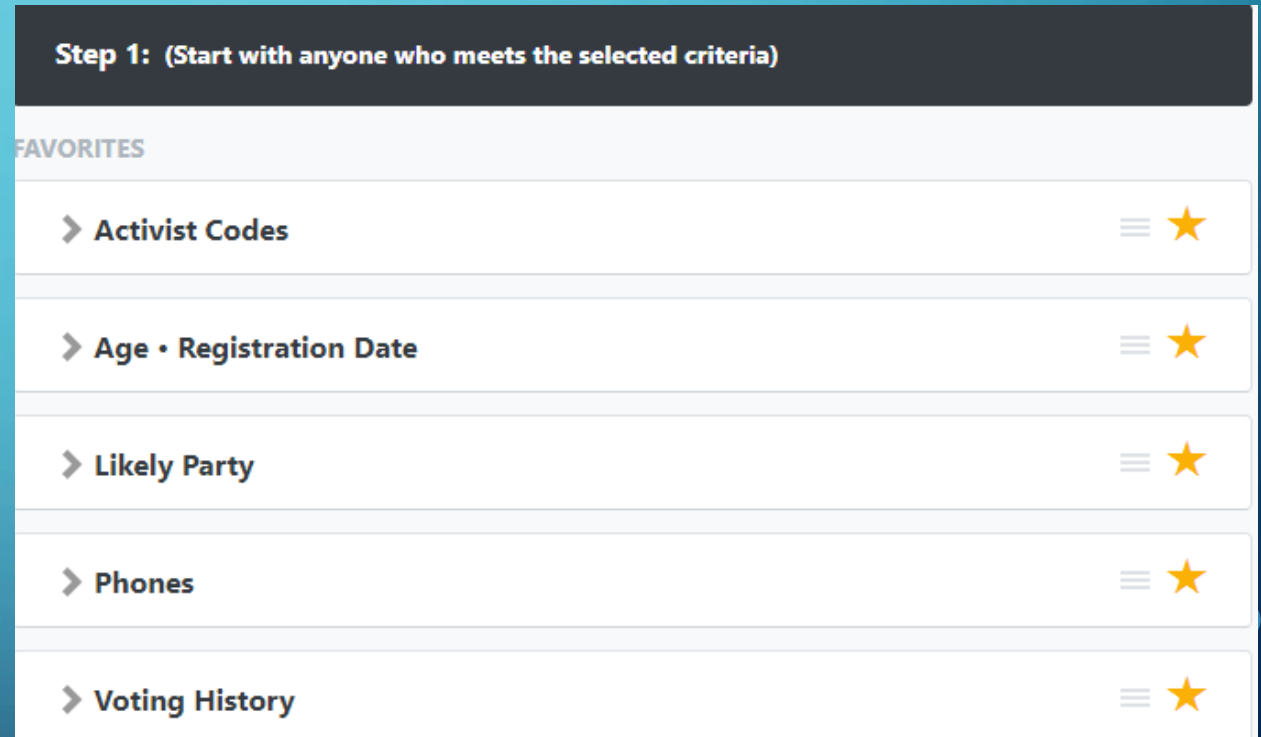
Create a list from your precinct that uses the following **CRITERIA**

- 1) Start with your BASIC LIST – add people
- 2) Choose Unaffiliated
- 3) Choose: Likely & Strong Democrats
- 4) Choose: Verified & Likely Cell Phones
- 5) Choose: Voted in at least 1 of the last 3 elections

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RUN SEARCH



A screenshot of a search interface. At the top left is a plus sign icon in a square. To its right is the text "-- People". Below this are two buttons: a white button with a plus sign and the text "Add Step", and a green button with a play icon and the text "Run Search".



A screenshot of a "Step 1: (Start with anyone who meets the selected criteria)" interface. The title is in a dark grey bar. Below it is a section titled "FAVORITES" in grey. There are six criteria listed, each with a chevron icon on the left, a hamburger menu icon, and a yellow star icon on the right:

- > Activist Codes
- > Age • Registration Date
- > Likely Party
- > Phones
- > Voting History

PRACTICE – ACTIVE 2016

Create a list from your precinct that uses the following CRITERIA

1) Use Current Search – remove people

RUN SEARCH

4) Choose: *Voted in no more than 1 of the last 5 elections*

RUN SEARCH

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

FAVORITES

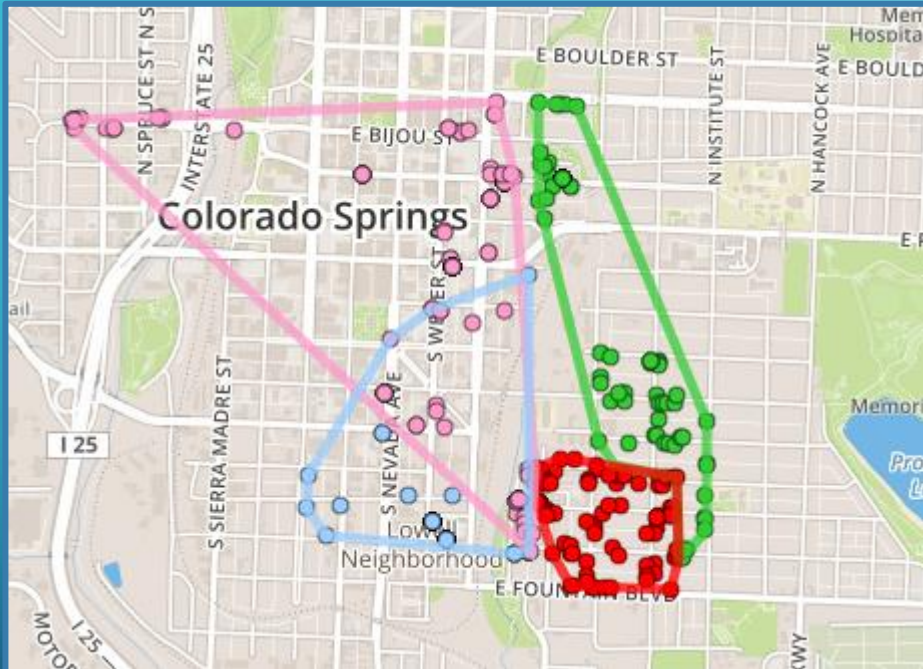
- > Activist Codes
- > Voting History
- > Party

+ -- People

+ Add Step Run Search

CRITERIA — INFREQUENTLY USED

Criteria Choice	Selection Outcomes
Addresses	Choose Voters by street or house # (apt complexes)
Canvass Status	IF Voter has been contacted before, that Data can be used
Email	If they have one listed
Survey Questions	SCRIPT answers – find matches to your needs
Targets	Broad list base with specific outcomes, i.e. U vote Dem 2020 Primary



CUTTING TURF

Some lists are TOO BIG for 1 person to process. This is when you may benefit from "CUTTING TURF".

This allows the creator to break a list into multiple pieces, determined by either head count or geography.

The smaller parcels can then be distributed to other people to assist in completion of a task, or utilized by a single person in more manageable sizes.

The qualifier for CUTTING TURF should be efficiency of completion. Many hands make light work ~ but the PO creating the work is responsible for overseeing its completion.

19 Home Phones

323
Send this list to the Turf Cutter Preferred Phones

364 Doors

371 Mailboxes

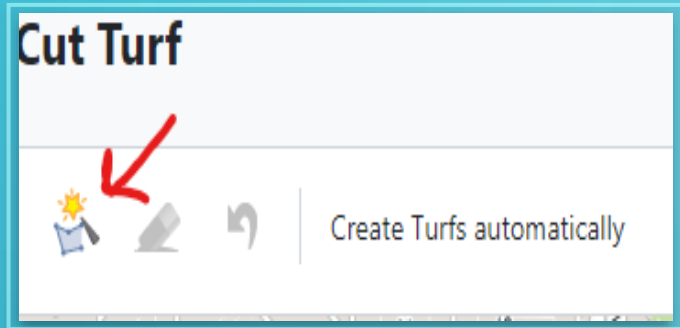
Edit Search ▾ Load List Save List As

Map Cut Turf Calls Letters Emails Export Labels Counts Reports Split

Bulk Apply Advertising SMS

CUTTING TURF

You can rearrange the boxes in the order/ layout that you prefer



TURF WIZARD

Walks you through creating turfs

NUMBERS VS GEOGRAPHY

Consider the outcomes, # of contacts & participants

- Method
- Equal number of addresses per Turf.
 - Group addresses close to each other. Addresses per Turf may vary.
- Turfs
- Addresses per Turf (must be between 13 and 364)

SAVE & EXPORT!

LISTS CREATED – NOW WHAT?

PAPER LIST

Accessible for non-tech

Delegation

Notes/ updates

MINIVAN

1-click completion

Instant Upload

Delegation

Accountability

EXPORTING A LIST TO PAPER

447 People

319 Home Phones

Create a printed report from this list

MiniVAN

Print

Map

PDF File

Your PDF is being created.

If you have a large list, the PDF creation process may take a few minutes to complete. To check on your file(s) at any time, go to the [Main Menu](#) and look for a link that says [My PDF Files](#).

Or go [back to My List](#).

VOTER CONTACT

Welcome Ultra

Main Menu | Quick Look Up | My List | View My Folders | My PDF Files (1)

CHOOSE PRINT

Report Format: Call, Walk, GOTV, Lit Drop

Contacted: Community Canvass

MY PDF FILES

Click the link or

Go to home screen – by your Welcome/ Name –
click My PDF Files

AVAILABLE FOR 30 DAYS

Manual data input

No way to track completion *

MANUAL DATA INPUT

- 1) Sidebar (Data Entry)
- 2) Choose GRID VIEW,
- 3) Select Your List or Enter List #
- 4) Mass entry of Contact Method

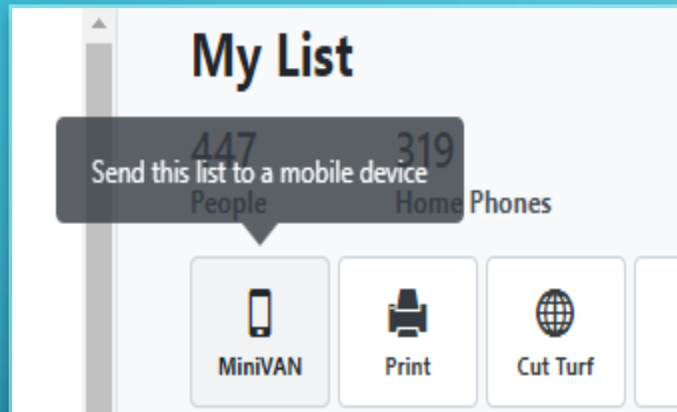
DATA ENTRY

Grid View

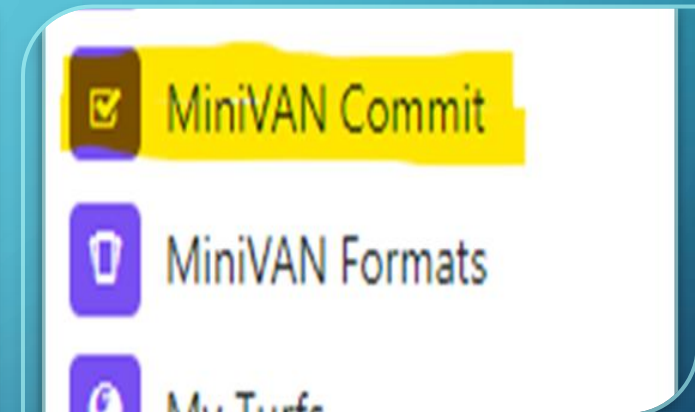
Records: 1 - 20 of 1,125 Voter File VANID:

Contacted By: Donahue, Ultra Date: 9/19/20 How: SMS Text

EXPORTING A LIST TO MINIVAN



List Name	Sync Date	Sync
List Criteria Training SAMPLE	9/19/20	1



CHOOSE MINIVAN

Canvasser: ANY Recipient in VAN

Campaign: the script/ questions

AVAILABLE FOR 90 DAYS

Keep track of completion & data input

UPLOAD DATA

Sidebar: MiniVAN Commit

Find your list, click commit (top right corner)

DATA, DATA, DATA!!

“Contact data ages like fish not wine...it gets worse as it gets older, not better.” — Gregg Thaler

“With data collection, ‘the sooner the better’ is always the best answer.” — Marissa Mayer

“Without a systematic way to start and keep data clean, bad data will happen.” — Donato Diorio



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QUESTIONS??

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STUDY HALL
Wednesdays: 530-800pm
Sundays: 230-500pm

Your
vote
MATTERS

