CONTENTS

GETTING STARTED

This guide outlines the basic functions of the NAACP VAN for organizers. It serves as the resource to answer questions encountered when using the NAACP VAN. The VAN is the online interface where organizers can access data about registered voters, unregistered community members, volunteers and supporters.

Finding the people you want to talk to (your targets) and using their contact information for voter engagement is the focal point of any electoral, civic engagement or issue campaign. The VAN can be used to find the people that you want to engage, and to then help you make phone calls, knock on doors, or send mail, and then track the results. You can then review your program and figure out who you still need to talk to or who might be interested in volunteering for your organization, all using the same set of tools from VAN.

The guide covers the basics of using VAN: finding a person's record, looking at a person's record, and creating lists of people. It also covers the tools that are available in order to do outreach, managing data, and conducting quick analysis. Finally it covers voter registration features. This guide only covers a piece of what VAN is capable of- use the "Contact the Admin" feature in VAN when you have questions or problems, or to find out about more advanced features.

Although most of the information in this guide talks about voter engagement for election work, identifying and persuading voters to go to the polls is just the beginning. VAN can be used on membership campaigns, volunteer campaigns, advocacy campaigns, event campaigns, fundraising, campaigns, and any time you have many people to keep track of.

You should have received a username and password from your program administrator. After you receive your information, go to http://www.naacpvan.com/ to get started

Note: The VAN is a tool to be used for NAACP organizing. Do not use your access for any purposes that wasn't assigned by the NAACP.

QUICK LOOKUP

Use the Quick Look Up function to see what contact and voting information is visible on someone's record. You can search by full or partial name, address or phone number.
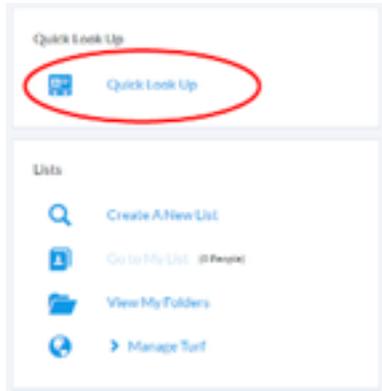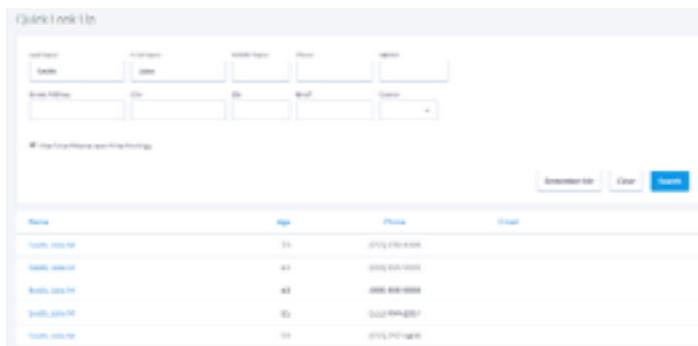

Step 1

Click on the **Quick Look Up** function.

Step 2

Enter information on the individual you want to find and click Search

Step 3

Select the person you were searching for.

NOTE: If too many people are found by your search (e.g. entering only "Smith" in the last name field), you may be told that your search is too broad. Alternatively, you may be given a list that stops after the first 100 or so results. In either case, you should try narrowing your search criteria by:

- Entering more information, such as middle name or city.

- Turning off the SmartName search technology.

- Using the VAN ID if you have it.
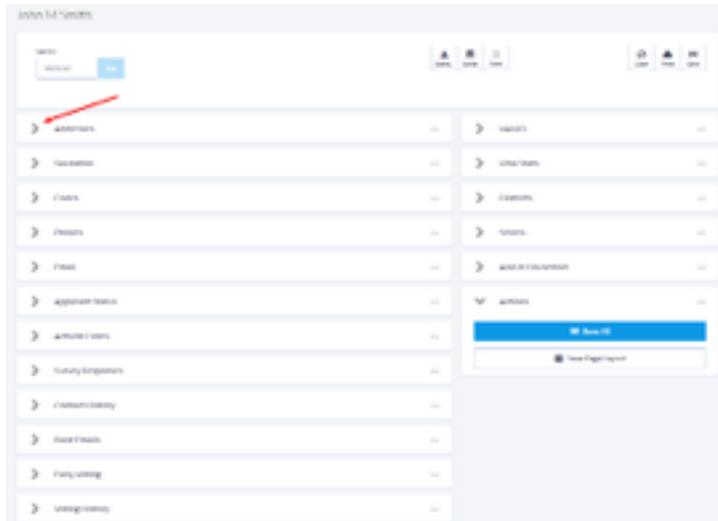
Step 4

Click on the **+** icons to see the information in each category.

Note: The VAN is a tool to be used for NAACP organizing. Do not use quick lookup for non-professional purposes.

This is an individual lookup.

CREATING LISTS

Creating a list of the people is the first step in defining who you will contact for your voter engagement activities. When creating your list, you ma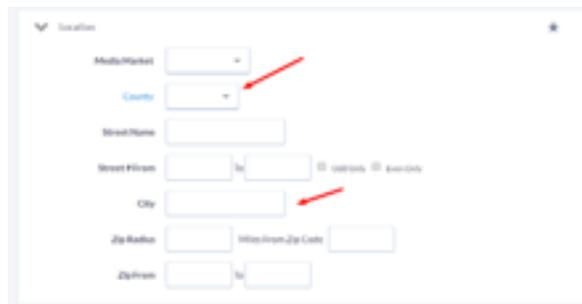y consider demographic criteria (age, gender), geographic criteria (precinct, county, legislative district), or voting criteria (voting history, registration status).
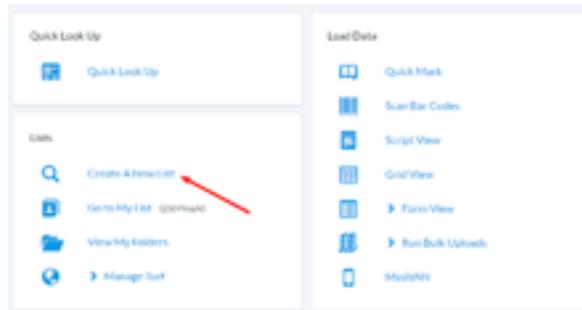
Step 1

After logging in, the main VAN menu is displayed. Under the "Create a List" menu, select **Create a New List.**

Step 2

Select the county from the "Location" menu. You can do this in two ways: a) For a single county select it from the drop down menu or b) For multiple counties click **County** and select from the list.

After you select a county, the list of townships will load (this could take a few seconds).

You can select a single township, ward or precinct from the drop-down menu or the "Field pickers", which allow you to select multiple townships, wards or precincts. To select multiple regions, click on Township, Ward or **Precinct**.

Step 3

When you choose to select multiple locations, you will see a full list; place checkmarks by your selected locations, then click **Save**.
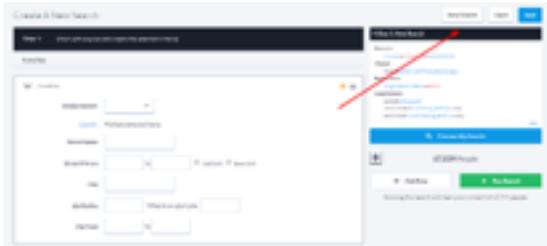
Step 4

After clicking Save, the VAN will return to the "Create a New List" screen. To create the list based on your selected criteria—click the Search button in the upper right.
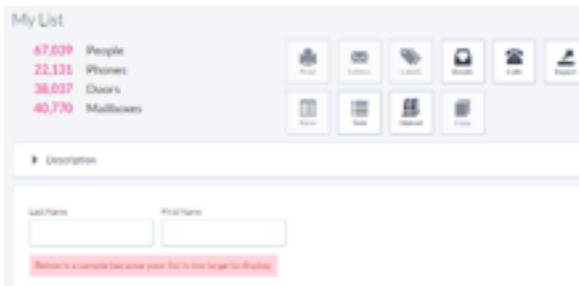
Step 5

If you create a very large list you might see in red: "Below is a sample because your list is too large to display." —-this is not an error—your whole list is still available for reports and export.

If you want counts doors or mailboxes—use the: Click for more counts.
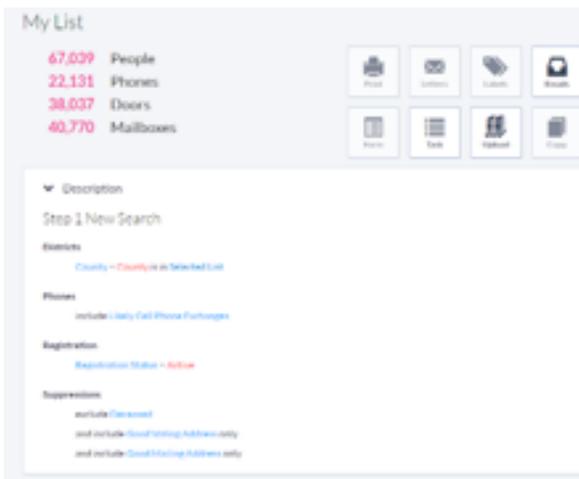
Step 6

To review the criteria that were used to create your list, click the + icon to the left of Description to expand the details of the search criteria.

SAVING A LIST

Step 1

Starting with your list, click on **Save**.

Step 2

To save the list of those specific voters, select "Save List".
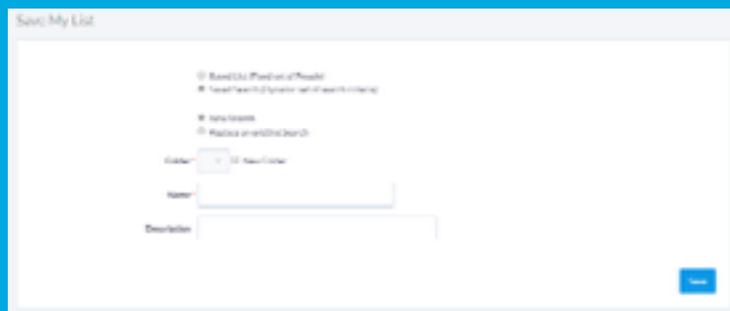
Step 3

The screen will refresh with the options for saving the list. Save the list in an existing folder from the drop down menu, or create a new folder by checking the box for "New Folder". (If you create a new folder, you also have to name it.)

Enter a name for the list and click **Save.**
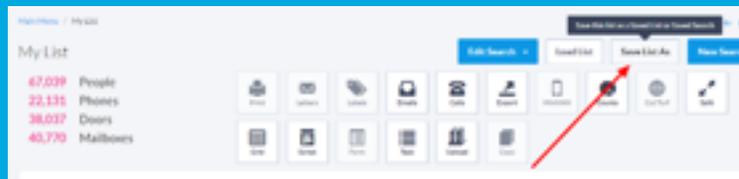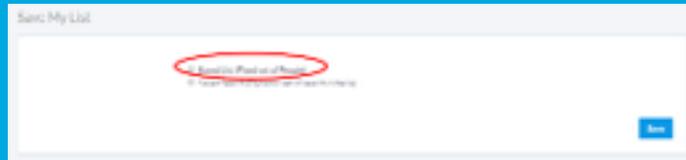
Note: When saving a list, you can save either a fixed list of people or search criteria.

- **Saved List.** If you save a list, it will save a list of every single person who fit your search criteria at the time when you hit save. If you are running a program where you are perpetually contacting the same people over and over, this is the way you should save the list.

- **Saved Search.** If you save search criteria, it will save the criteria currently being used. Next time the list is loaded, it'll rerun the criteria, and people can drop in or out of the universe.

Example: There is a person who lives in Precinct Z. A search which is limited to Precinct Z includes that person in January. But the person re-registers to a different precinct in March. An organizer re-runs the list in May. If the person was saved to a **Saved List**, he'd still be part of the list. If the person was saved as part of a **Saved Search**, he would no longer appear after opening the list.

LOADING LISTS

Once a list has been saved, you can load it again later, or edit or delete it as needed.
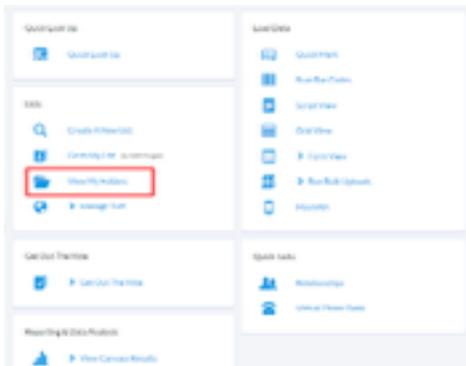
Step 1

Start by clicking on **View My Folders** on the Main Menu.
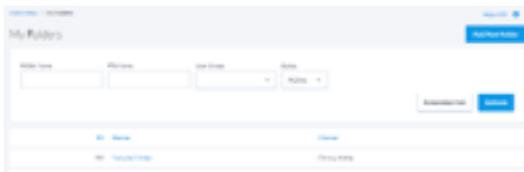
Step 2

Click on the folder name that has your saved list.

SHARING LISTS

To share the list with other users, you must share the folder that contains the list.

Step 1

Start by clicking on **View My Folders** on the Main Menu.

Step 2

Click on the folder name, the same way you would to load a saved list or saved search.

Step 3

Click on the Edit Folder button on the top right.

Step 4

Use the steps above to edit the folder; select a user name on the right and click add to move them over so they have access to the lists in the folder. You can also rename a folder, add a description, or change the active status.

ADDING, REMOVING AND NARROWING FROM A LIST

Lists can encompass many steps. After your first step, you can add, narrow, or remove people from your list. If you do multiple steps, the search is run in the same order of steps as you create it.
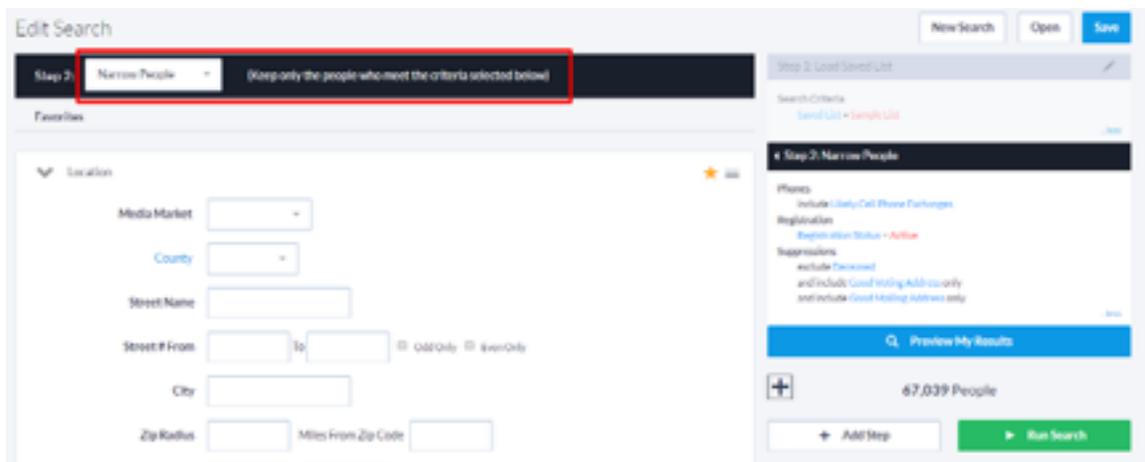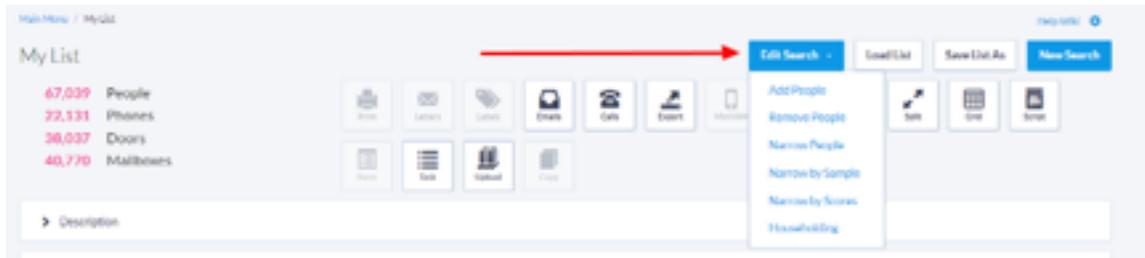
- **Add People** – runs a new search to find people to be added to your current list. All people from your current list remain in the new list, as well as the people from the new search.

- **Remove People** – removes anyone from that list that matches your new search. Your list can only get smaller using this option. An example could be if you have a list of people over 65, but you want to remove a county. That will leave a list of people over 65, in all counties (or unknown county), but no one from the county specified.

- **Narrow People** –keeps only the people from your list who matches the criteria in the search.

Note: Remove people and narrow people are very similar, but are not the same. For example, if you *narrow* a list to women, it is the same as *removing* all men from the list. However, if there are people of an unknown gender the results of narrowing and removing will be different. If you narrow the list to women, only women will remain. If instead you remove all men, both women and people of unknown gender will remain.
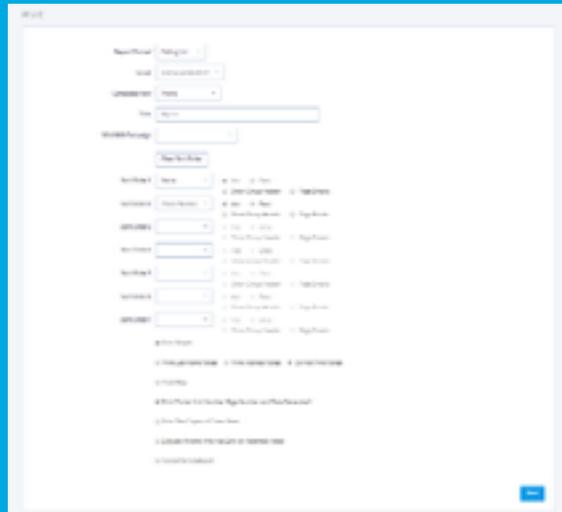
CREATING PHONE LISTS
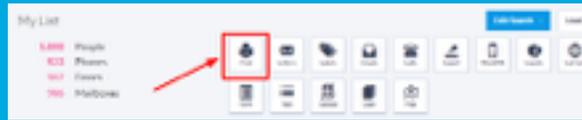
Step 1

Beginning with your list, click on Print**.**

Note: It will be helpful if you narrow your list to "Phones Only" so you aren't including people without phone numbers.

Step 2

Select report options. To create a phone call sheet, select **Calling list** from the "Report Type" dropdown menu.

Select a **Script** from the dropdown menu. A script is the questions that your callers will be asking the people being called.

Select **Calling** from the "Contacted How" options.

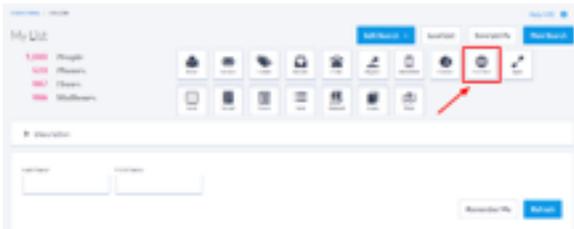When all the options are selected, click **Next.**

Step 3

Follow the page setup instructions to configure your printer settings.

Before printing, review your call sheets to make sure all the fields (name, phone number, call results, question responses) are there.

Print your call sheets. The result will be call sheets in numeric order of phone number.
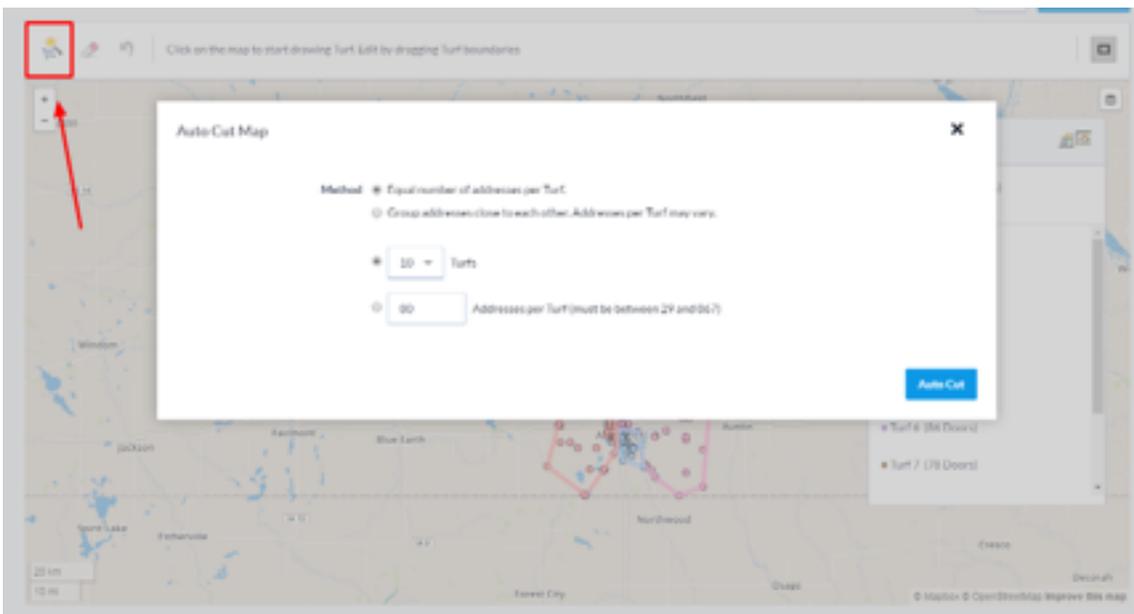
Step 1

Once your list is less than 2,500 doors, you'll have the option to Cut Turf.

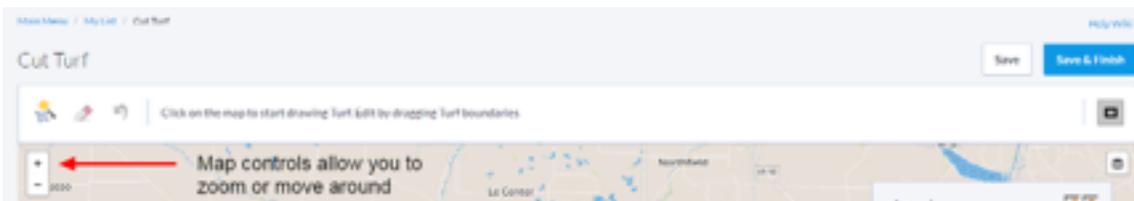**Note: Make sure you narrow your list to "Walkable Houses"**

You'll see a screen like this.

Step 2

Select Auto Cut Map. See instructions below

Eventually, you'll have your doors assigned into different turfs. They'll end up with different colors so you can see them in detail on the map.

ENTERING RESPONSES WITH GRID VIEW

After voters or residents have been contacted, and their responses have been written down, there are several options for data entry. One method is using the "grid view" option, which is outlined below.
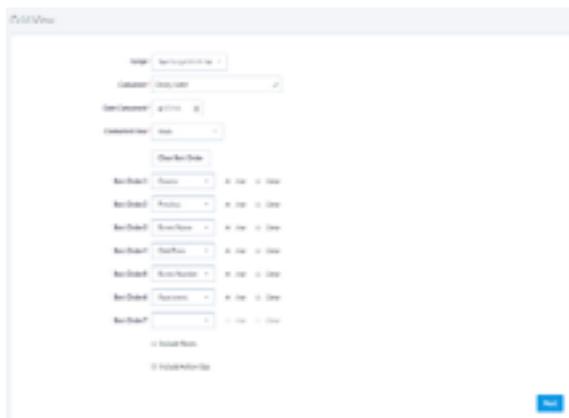

Step 1

From the main menu, select **Grid View** from the "Load Data" menu.

Step 2

Select "Let me select a List Number" to enter the list number that appears at the bottom of a walk or call sheet.

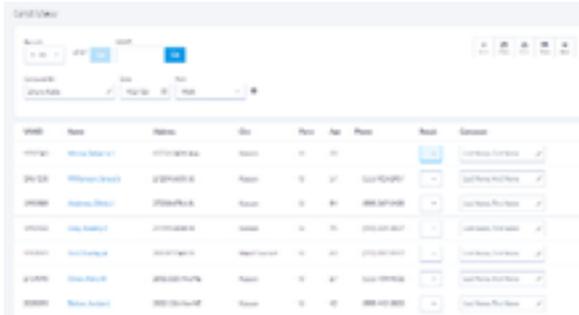Click **Next** to continue.

Step 3

Select the **Script** that was using for the canvass.

Select the Canvasser (if you aren't sure who canvassed choose Volunteer) from the dropdown menu.

Select the **Date Canvassed**, the day the calls were made or doors were knocked.
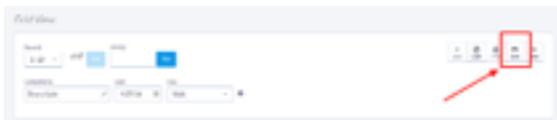
Select the **Source** as calling or walking.

Click **Next.**

Step 4

Go down the list and fill in the appropriate **Result** (not home, moved, wrong number, etc.) for each person on the list who did not answer the questions.

For voters who answered the questions, skip the result and select the answer to each question from the dropdown menus.

Step 5

When the results for all the voters have been filled, click on **Save**. This will update all of the records on your list—make sure all the responses are entered correctly!

Click the **>>** arrow to go to the next set of voters.
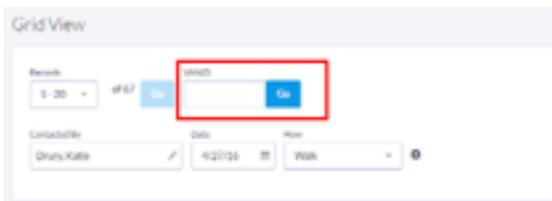
Step 6

To jump to a different place on the list, click **Go to VAN ID**. Enter the voter's VAN ID and click **Next.**

The list will reload in the same order, starting with the person whose ID you entered.

ENTERING RESPONSES WITH QUICK MARK

Step 1
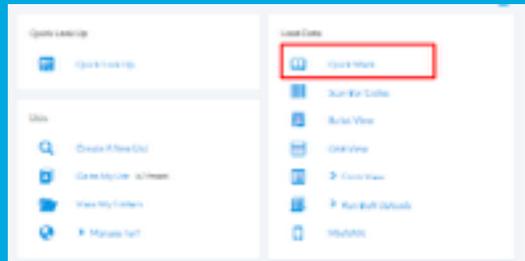
From the Main Menu, click on **Quick Mark.**

Step 2

There are several options of how to alter records in VAN. For this example, we're going to indicate people that want more information about becoming a NAACP member. .Select "Add a Survey Response" and click **Next.**

Step 3

Select the survey question that you wish to use, and the date that the people were contacted, the person who made the contact, and how the contact was made.

Click **Finish** to start applying the activist codes to people's records.

Step 4

Fill in the information from the petition. You don't need to fill in every search field; just a first and last name will help you find the correct person. Click **Search.**

Locate the correct people, and add the survey response codes.

To save the edits to this person's record, click **Save/Search.**

Step 5

To look up the next person, click **Clear**. Then type in the next person that you want to look up. Repeat for each person.

CROSSTABS

The "Counts and Crosstabs" feature can create counts by demographic or geographic data, or by responses to a question. The counts can be accessed from the "My List" screen or from the main menu.

Step 1

From your current list, click **Counts** to analyze the data in your list.

Step 2

To count the list of voters in each precinct. Within the "Column 1" dropdown menu, select **Precinct.**

Click the **Refresh** button.

Step 3

After running the count, a chart will appear breaking down a count of your list by precinct.

Step 4

To crosstab the precinct counts by age from "Crosstab 1", select **Age.** To see the results in both numeric and percentages, click the box to **Show Percentages.**

Click **Refresh** to perform the count.

Step 5

By choosing one field for the column, and another for the crosstab, you can see how the voters fall into age categories across the precincts.

VIRTUAL PHONE BANK

A Virtual Phone Bank is a great way to have volunteers or staff make phone calls. All callers can work from the same list without duplicates, and data entry is done as the calls are made. People can participate in a virtual phone bank from anywhere there is a computer with internet access and a phone.

Callers need a computer with an internet connection and a phone line. After the Virtual Phone Bank is set up, your staff or volunteers can log in and begin calling.
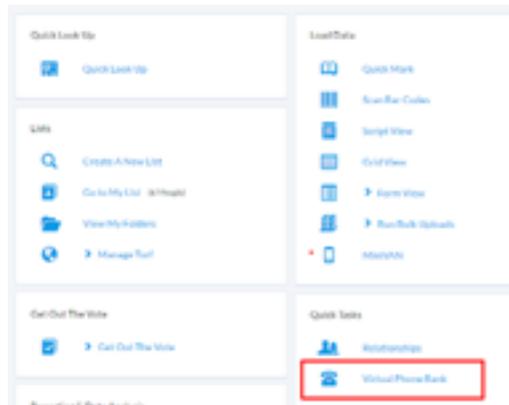
Step 1

The Virtual Phone Bank can be accessed from the main menu, and will be listed under "Quick Tasks". Note: you will only see this option if a Virtual Phone Bank has been set up to be used by your account.
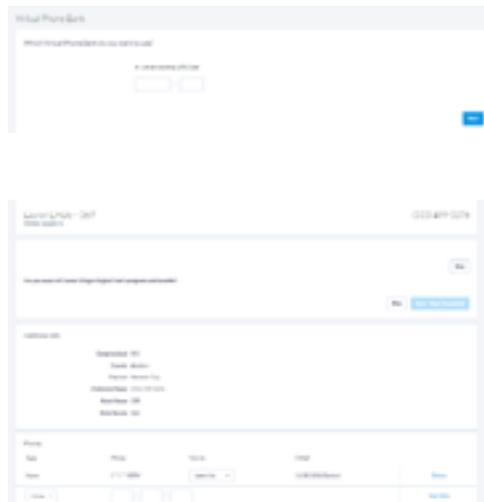
Step 2

Enter a VPB code to select a phone bank.
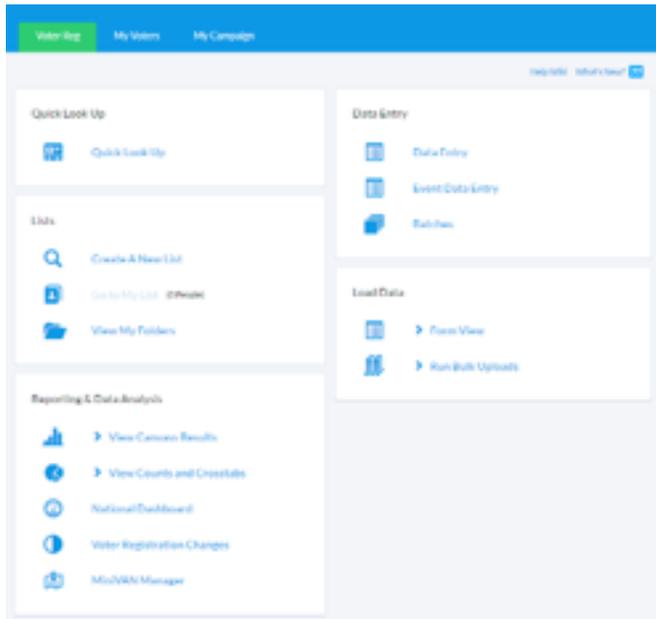
Step 3

Call the person shown. If the person isn't available, use the options to indicate the result of the call, such as "Not Home" or "Moved".

If that person is reached, use the option to indicate their responses to the questions.

Once the call is complete, select **Save/Next >>.** This will save the data entry for that person, and the display the next person to be called.

The Voter Registration Tool is a method for groups to data enter, track, and analyze the people they register to vote.
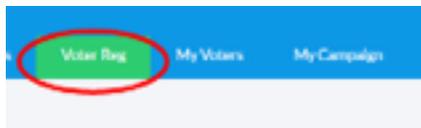
Click on the "**Voter Registration Tab**" at the top right of the screen to use the Voter Registration Tool.

You'll see many options on the next screen. Depending on your permissions, you may not see everything below.

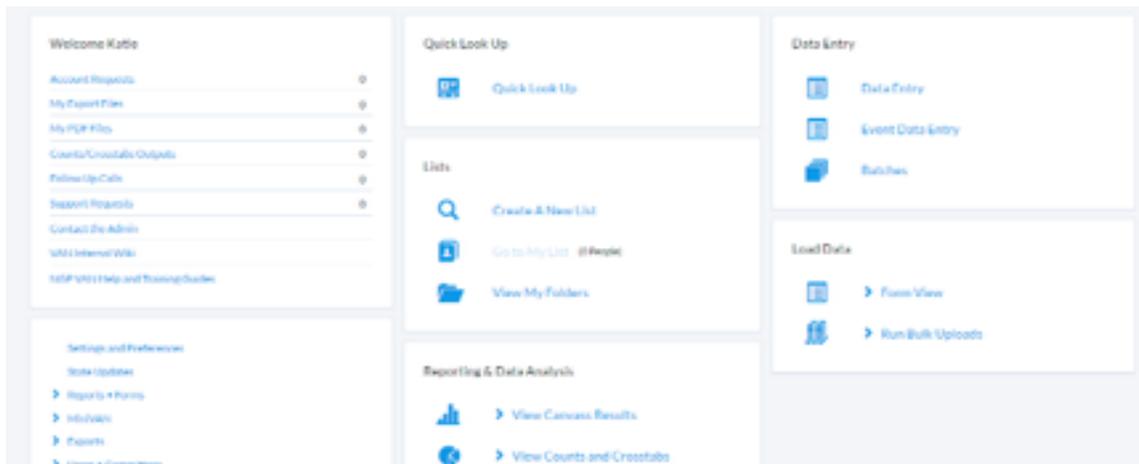There are three main steps to using the voter registration tool.

1. **Create a Voter Batch.** Batches are the grouping of voter registrations. This connects the individual registrants to the particular event or program where these were collected.

2. **Data Entry.** Entering the data for voter registration forms in the batch.

3. **Data Completion.** Marking the data as completely entered.

Data is entered into the Voter Registration Tool in batches. A batch is a group of voter registration forms that will be processed together. Because of variation in size of organizations and voter registration drives, batches can be defined in many ways. It is most important to develop a batch system that helps your organization keep track of when and where forms have been collected.

Users who enter the voter registration data need to be able to find the correct batch to enter data to by using a batch's unique name. Examples of batches are all cards collected at a certain event, or all cards collected over the same day by the same person. For example if you had a voter registration table at an Action Rally, you might call a batch - 20110816_ActionRally, or if you have multiple offices doing daily canvasses you might want to create batches based on office location and dates.

Again, it is most important that you develop a batch naming and submission system that works for your organization.

Batches can be in one of four different states:

1. **Entering** – a batch is open for new cards to be added. All cards in the batch can still be edited.

2. **Completed** – a batch is no longer open, and new cards cannot be added. However, all cards already in the batch can be edited to fix mistakes.

3. **Committed** – the batch is no longer open, new cards cannot be added, and all of the cards already in the batch are locked and can no longer be edited. Once a batch is committed, there is no going back, and the cards are processed by VAN.

4. **Processed** – once a committed batch has been processed by VAN, the batch is processed. New cards cannot be added, existing cards cannot be edited. The people on cards that were successfully processed will now appear on the VAN My Voters list.

From your main voter registration screen, go to "Voter Batches" then "Add a New Voter Batch" on the Voter Batches Screen
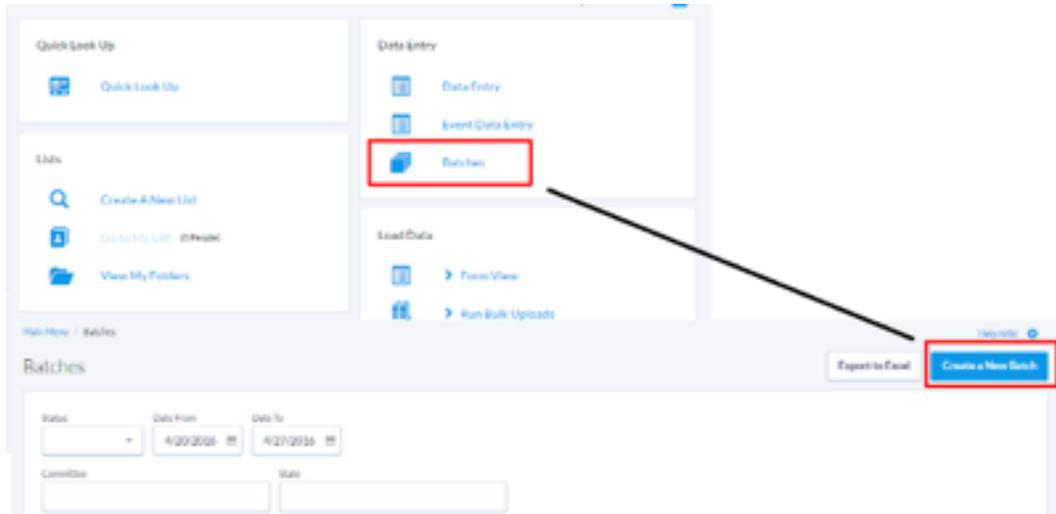
This gets you the screen where you can create the batch. Names of batches will vary for each chapter, but State will always be the state you are working in and Data Entry Form will always be your states standard form.

Once a batch is created, data can be entered from the voter registration forms collected in that set.

Name: Identifies the batch in the list of all of the batches. When you want to enter voters for a specific batch you will look for this name.

To make batches easier to find and organize the names for each batch should all use the same convention. Talk with your state data manager about a suggested naming convention. Some organizations have been using: State.OfficeCode.Year.Month.Day

Examples:
Philadelphia—PA.PHL.2012.08.30
Columbus—OH.Columbus.2012.09.05

State: The state for which you are entering forms. All cards in a batch must be registrations for the same state.
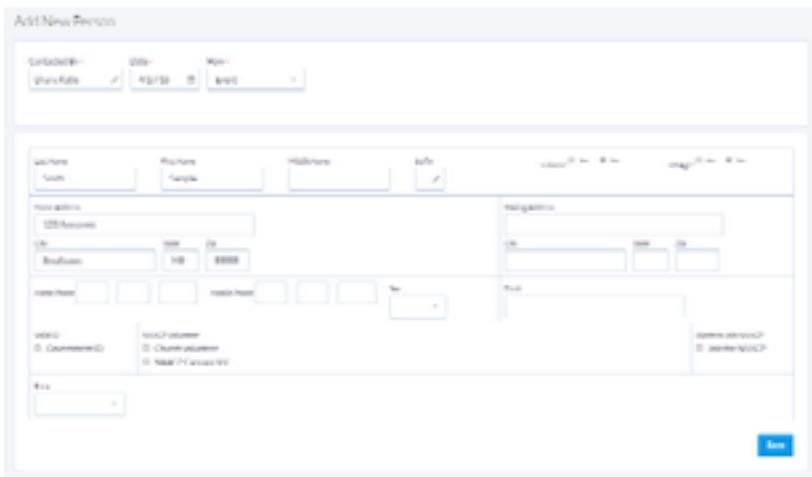
Data Entry Form: The standard form that has been created for your state.

VOTER REGISTRATION TOOL – DATA ENTRY

From the main voter registration page, click on "Data Entry" tab. Select your voter batch you want your registrations associated with. If you happen to have access to multiple states, you may need to select a state first.
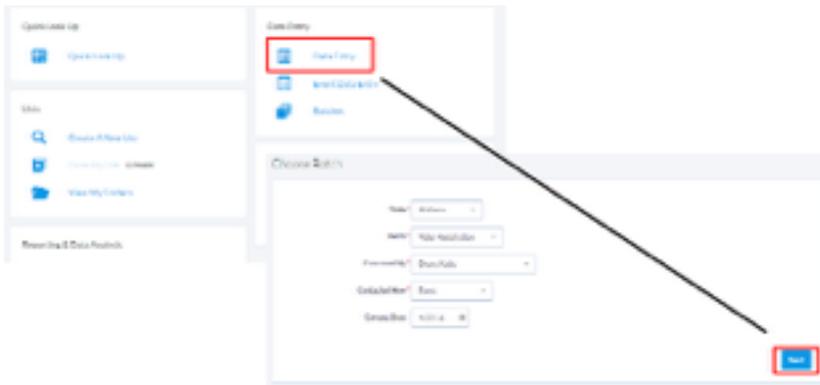
From there, you will add any and all registration data collected. Once you hit save, the data will be saved and the fields will clear so you can enter the next registrant.

VOTER REGISTRATION TOOL – PROCESSING BATCHES

To change the status of a batch, go to the Voter Batch screen, and click on the batch.

From here, you can set the status of the batch to then hit "Save".

VOTER REGISTRATION TOOL – REVIEWING BATCHES

Before changing a batch from "completed" to "committed" it is useful to review the cards in the batch.

To review the batch, go to the Voter Batch screen, and click on the batch

You will see a list of voters that have been entered for the batch. You can search for a specific voter by typing in the First or Last Name. Clicking on the voters name will take you to their information to edit or review.

If you want the list of voters available in an Excel spreadsheet you can click "**Export Voters**".

FINDING REGISTRANTS ON THE VOTERFILE

Batches marked as "committed" are processed over night by VAN. Once a batch has been processed, the people from that batch can be found on VAN's My Voters. People that were not previously registered to vote will be classified as "applicants".
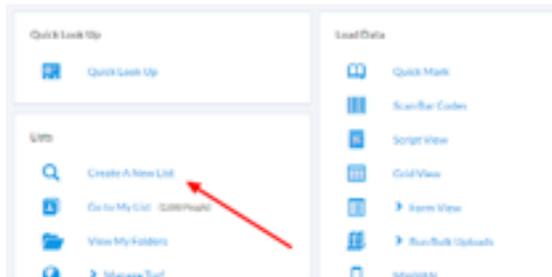
Step 1

Make sure you are looking at the My Voters tab, and not the Voter Registration tab. Go to create a new list.
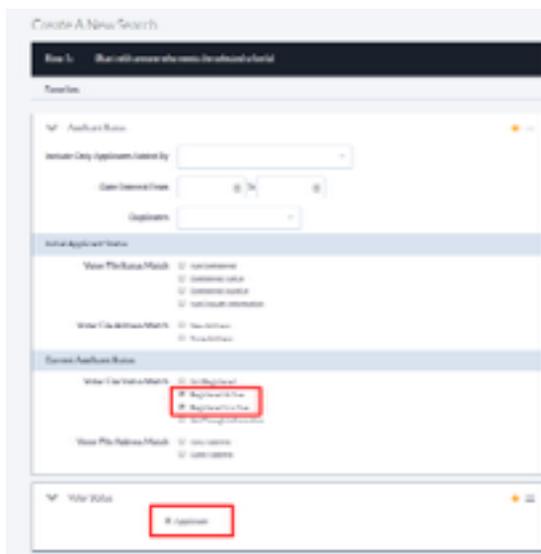
Step 2

To find all of the people from a batch, make sure to click on "Applicant" as well as "Registered Active" and "Registered Inactive" under "Registration Status"

Step 3

Select the options in the "Applicant Status" section to specify which people to find.