

Setting Up a MiniVAN Canvass in VoteBuilder

By Jennifer Gaddy, 2ndViceChair@meckdem.org, June 2019

WHY USE MINIVAN?

MiniVAN is a mobile canvassing application. Used well, it can replace much (or all) of your traditional list printing, data entry, and even turf cutting. It improves efficiency for planners and canvassers.

SOME KEY BENEFITS:

Allows a group of volunteers to pull canvassing targets from a common “pool”	Saves paper (more environmental!) and eliminates stacks of lists lying around
Puts data directly back into VoteBuilder – no misplaced papers or data entry	Lets organizers send canvassers turfs and targets remotely, on-the-fly
Has map features that help canvassers navigate neighborhoods and find their “next door” more easily	Free for us volunteers to use – no paper and pen purchases needed
Learning MiniVAN prepares you and your volunteers to help with CAMPAIGNS that use it	Some find carrying a phone less bulky and awkward than a clipboard

The very first step in setting up a canvass is *the* most important:

STEP 1: Decide WHOSE DOORS ARE YOU VISITING (the targets), and **WHY YOU ARE VISITING THEM** (the Ask). This will help you focus and make decisions.

STEP 2: Write the script for your canvassers.

There are many existing scripts in our Mecklenburg list from previous campaigns. You may want to look at a few to see how they’re put together and what they include. Choose Main Menu > Admin. Menu > Codes • Questions • Scripts > **Scripts** for the list. Then click **Add New Script** (button, top right).

A **Script** is built from three kinds of “blocks” – **Text**, **Survey Question**, and **Activist Codes**. To add a block of Text to the script that the canvasser will read, type it in the box and click “Add.” To include a Survey Question from the list already in VoteBuilder, choose one and click “Add.” *Note: Mecklenburg users cannot currently CREATE brand new Survey Questions but we have requested this ability.*

Add Script Element

Text	<input type="text"/>	Add
Survey Question	2018 Issue: 2018 Gen Issue	Add
Activist Code	<input type="text"/>	Add

As you add blocks, you can drag them up and down to rearrange their order using the  icons.

Be sure to click “Save” under all the blocks or at top right when you’re done.

Survey Questions

Question 2018 Issue: 2018 Gen Issue

- Responses
- Civil Rights
 - Economy
 - Education
 - Environment
 - Foreign Policy
 - Gun Safety

You can see a full Survey Question after you add it. Delete if it's not what you want.

Example: Adding a Survey Question

Why Use Survey Questions? Adding a Survey Question will allow you (and other organizers) to search for voters who answered those questions a certain way – for example, voters who said “Education” was their top issue, or voters who said they would support Democrats in 2020.

STEP 3: Create or load a List of targeted voters to canvass.

(We have covered how to create a List and cut turfs in previous VoteBuilder training and will not repeat it here.)

STEP 4: CREATE A MINIVAN CAMPAIGN

TRADITIONAL METHOD:

From the Main Menu, select **MiniVAN Campaigns**.

Then click the blue **Add New MiniVAN Campaign** button, upper right side of screen.

Under **Campaign Details**, select your MiniVAN Format. The “**Canvassing MiniVAN Format**” will work for most canvasses. Enter a **Campaign Name**, Description (optional), and select a contact method (for canvassing, select Walk) from the Contacted How dropdown menu.

LINK A SCRIPT TO YOUR CAMPAIGN:

To keep things simple, select **Choose a Script for everyone in the list** to address every target voter with the same script. Then select a Script.

(Advanced users can choose a Default Script and alternate scripts, but this manual will not cover that.)

We recommend you select **Enable Auto-Sync**. This has MiniVAN automatically connect and refresh data between VoteBuilder and the mobile device every 5 minutes.

Campaign Details

MiniVAN Format* Generic Format [Add New Format](#)

Description

MiniVAN Campaign Name* Welcome New Voters 226

Description Script to welcome new voters, inform them about voting locations, volunteer recruit, update contacts

Contacted How* Walk

Script Details

Script Options

- Choose a Script for everyone in the List
- Choose a Default Script and up to 4 alternate Scripts
- Choose a Default Script and alternate Scripts based on Target's Subgroups

Script* Newly Reg Voters Welcome [Add New Script](#)

Advanced

Auto-Sync Enable Auto-Sync

DISTRIBUTED CANVASSING (NEW, EASIER METHOD):

From the Home page, find the **Distributed Canvasses** box. Click **Create New**.

Give your canvass a **Name**.

Specify how many doors each canvasser can “check out” at a time, usually the number they could knock in a 24-hour period.

Select a **MiniVAN Campaign** (optional).

Select a **Saved Search** of the voters you want to canvass.

MiniVAN will then give you a list number to give to your canvassers. When they type in the number, the MiniVAN app will “check out” doors to them based on where they are located at the moment! You can find the list number on your Home page under **Distributed Canvasses** – it expires in 30 days.

Create Distributed Canvass

Distributed Canvasses are MiniVAN walk lists that are automatically distributed based on your canvassers' locations.

Name*

PCT 226 Distributed Canvas June

Doors Per Canvasser*

40

MiniVAN Campaign

226 Testing MiniVAN

Saved Search*

226 D Sometimes Voters

Create Distributed Canvass

Distribute this list number to all of your canvassers — their turf will be auto-generated based on their current location when they type the list number in to MiniVAN.

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If you want to read more about Distributed Canvasses and how/why it was developed, there's a good interview at <https://blog.ngpvan.com/distributed-canvassing-interview>

STEP 5: SELECT YOUR TURFS

You should already have Turfs cut from previous VoteBuilder training or precinct work.

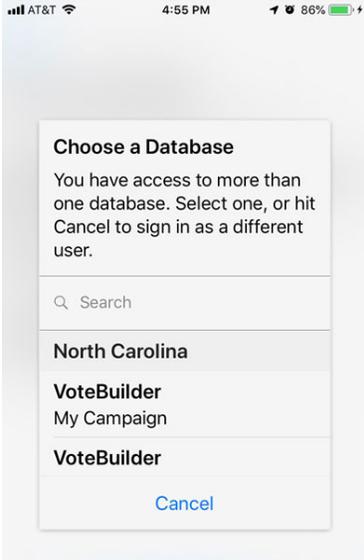
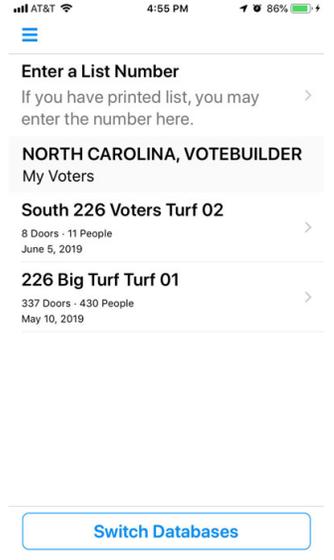
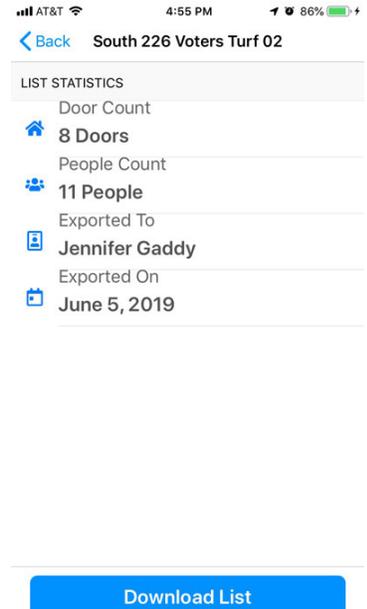
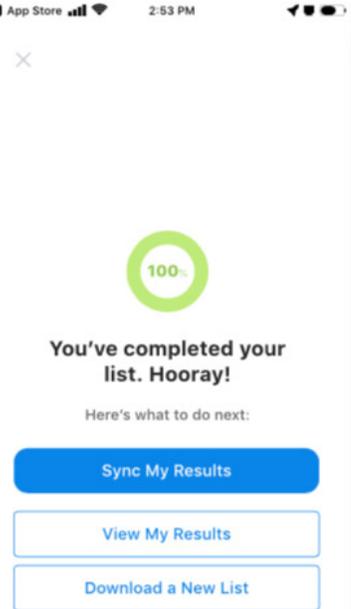
- Access My Turfs from the Main Menu or  menu.
- Select the Turf you intend to canvass by checking the box to the left of it.
- On the top right-hand side, click **Quick Actions**. From here, you can Print a turf packet, send a list directly to MiniVAN, or generate list numbers that you will distribute yourself to canvassers via email or text. *All list #s expire after 30 days.*

To send the lists out in bulk, select the Turf, click on Quick Action, and choose **Send to MiniVAN**. A window will pop up, in which you can assign a canvasser or canvassers to each block of turf. This will PUSH the list to their MiniVAN/ActionID account, so when they log in, they'll be able to load the list.

STEP 6: Ask your canvassers to download the free MiniVAN Touch app from the iOS App Store or Google Play store. They will need to use or create an ActionID.

You can then provide them with the list number from a Turf Packet or “push” them a list. They’ll have the script, voter list, and any other details from that walk packet directly to their mobile device.

What Canvassers will see in MINIVAN:

<p><i>Login Screen. Canvassers will need a current ActionID.</i></p>	<p><i>If they’ve canvassed before, a canvasser may have access to multiple databases. They can switch from one to another until they see the list you sent.</i></p>	<p><i>If you sent a list to them via VoteBuilder, they’ll see it here. If not, they can enter a List Number that you send them.</i></p>
		
<p><i>On this screen, the canvasser sees the overview of the list.</i></p>	<p><i>This is an individual voter record along with the script.</i></p>	<p><i>When canvassers complete a list, they’re encouraged to sync and download a new list.</i></p>
		

Pop-up notifications in MiniVAN encourage canvassers. These notifications make it easier to operate the app and will help the canvasser stay motivated along the way. Notifications appear after canvassers successfully canvasses their first home and at the 25%, 50%, and 75% progress marks.

You can track voter contacts from the past two weeks in Mecklenburg with the Contact History Report. Find **Report Manager** in the Main Menu, and select **Contact History Report**. You can sort by Campaign, Contact Type, and Canvassed By. Choose one of your Canvassers to see how they did.

RESOURCES FOR YOUR CANVASSERS:

- A 3-minute “pep talk” video that walks canvassers quickly through canvassing with MiniVAN 8. Fast-paced. May be more suited for younger/more tech savvy volunteers. <http://bit.ly/minivanin3minutes>
- A 7-minute video that walks canvassers, step by step, more SLOWLY through downloading and using MiniVAN for canvassing, including how to use the map features and how to mark responses. <http://bit.ly/2019MiniVANAppTutorial>
- A 7-minute upbeat video about canvassing best practices by SwingLeft (grassroots progressive organization). <https://academy.swingleft.org/before-you-go-canvassing>

STEP 7: COMMIT YOUR MINIVAN DATA

When canvassing is done, select “Go to Commit Page.” *NOTE: Mecklenburg precinct chairs do not currently have this ability. Please contact support@meckdem.org to find out how to commit your data to VoteBuilder.*

If you have questions about this guide, contact Jennifer Gaddy at 2ndViceChair@meckdem.org.