

World's Second Shortest VAN Tutorial: Setting up Activist Codes, Survey Questions and Scripts

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This tutorial will tell you how to create Activist Codes and Survey Questions, and then combine them into a Script that can then be used in either a Virtual Phone Bank or for Call and Walk Sheets. Remember to use the "life-ring" icon in the upper right hand corner of most screens in the VAN to get more information. For more help, get in touch with the person who made your account, or you can always get in touch with Dan at the contact information above.

The Voter Activation Network (VAN) lets you store three primary kinds of information about voters:

Activist Codes. From the life-ring documentation: "Activist Codes are tags, or labels, that can be applied to individual voters. Activist Codes are used instead of survey questions when a 'No' answer is irrelevant. For instance, while a user may care whether a voter wants a yard sign or is a labor leader, they likely have no interest in tracking voters who do not want a yard sign or are not labor leaders. In this way, users can store, look up, and use specific data about voters rapidly and efficiently."

Survey Questions: Again from the in-system documentation: "Unlike Activist Codes, which are simple tags that are either applied to a voter or not, Survey Questions allow multiple responses. Thus Survey Questions offer significantly more flexibility in tracking detailed information about voters." Survey Questions are the primary way you will record the information your field organizers get from voters.

Notes: Note fields are free-form text fields that are most useful for the times when you get into more in-depth conversations with voters. They can be turned on in the Virtual Phone Bank, and are also available in the individual records via Quick Look Up and through the Script View.

Activist Codes and Survey Questions, combined with text elements, can be combined to form scripts.

Step 1 - Create an Activist Code

From the main screen, pick "Codes – Questions – Scripts" on the left hand side and then "Activist Codes." You'll see a list of any existing Activist Codes your committee already has created or has access to. From here pick "Add New Activist Code" in the upper right hand corner, which will bring you to a screen like this (although with blank fields):

California VoterConnect - New - Mozilla Firefox

File Edit View History Bookmarks Tools Help Related Links

http://pepvan.com/ActivistCodeDetails.aspx

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C A L I F O R N I A
Voterconnect

VOTER ACTIVATION NETWORK LOGOUT

My Voter File My Campaign

► Main Menu ► Activist Codes ► New

New Activist Code

Activist Code Type	Constituency/Issue *
Long Name	WillVoteEarly *
Medium Name	VoteEarly *
Short Name	VE *
Description	This person says they will vote early
Script Question	This ballot campaign is so important that we're trying to encourage people to vote as soon as they get their ballot. Can we count on you to send yours in as soon as you get it in the mail?
Scope	<input type="radio"/> Public <input checked="" type="radio"/> Private
	<input type="checkbox"/> Is Also Activist
	<input checked="" type="checkbox"/> Can Be Assigned or Removed
Applies To	<input checked="" type="checkbox"/> My Voter File <input checked="" type="checkbox"/> My Campaign <input type="checkbox"/> Organizations
Status	<input checked="" type="radio"/> Active <input type="radio"/> Archived <input type="radio"/> Inactive

Save

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Done #536,223

To fill out this form, pick whichever type seems most appropriate from the first drop down, then come up with long, medium and short names, a description and how you would ask the question in a script. Last pick “private” (usually) and check both “My Voter File” and “My Campaign” under the Applies To field. Hit Save and that’s it.

You can go back and edit these setting later if necessary. However, you can’t delete Activist Codes (only set them to “Inactive”), so think the codes you’re going to need through and take care to double check everything before hitting Save.

Step 2 – Create A Survey Question

To create a Survey Question, click on “Codes – Questions – Scripts” again and Survey Questions, then “New Survey Question” in the upper right hand corner. You can create as many Survey Questions as you’d like, so for a typical campaign you might have national and local issue identification (“issue ID”) questions, a question about one or more ballot initiatives, and (if you can do partisan work) questions about one or more candidates, or a pledge to vote (if nonpartisan).

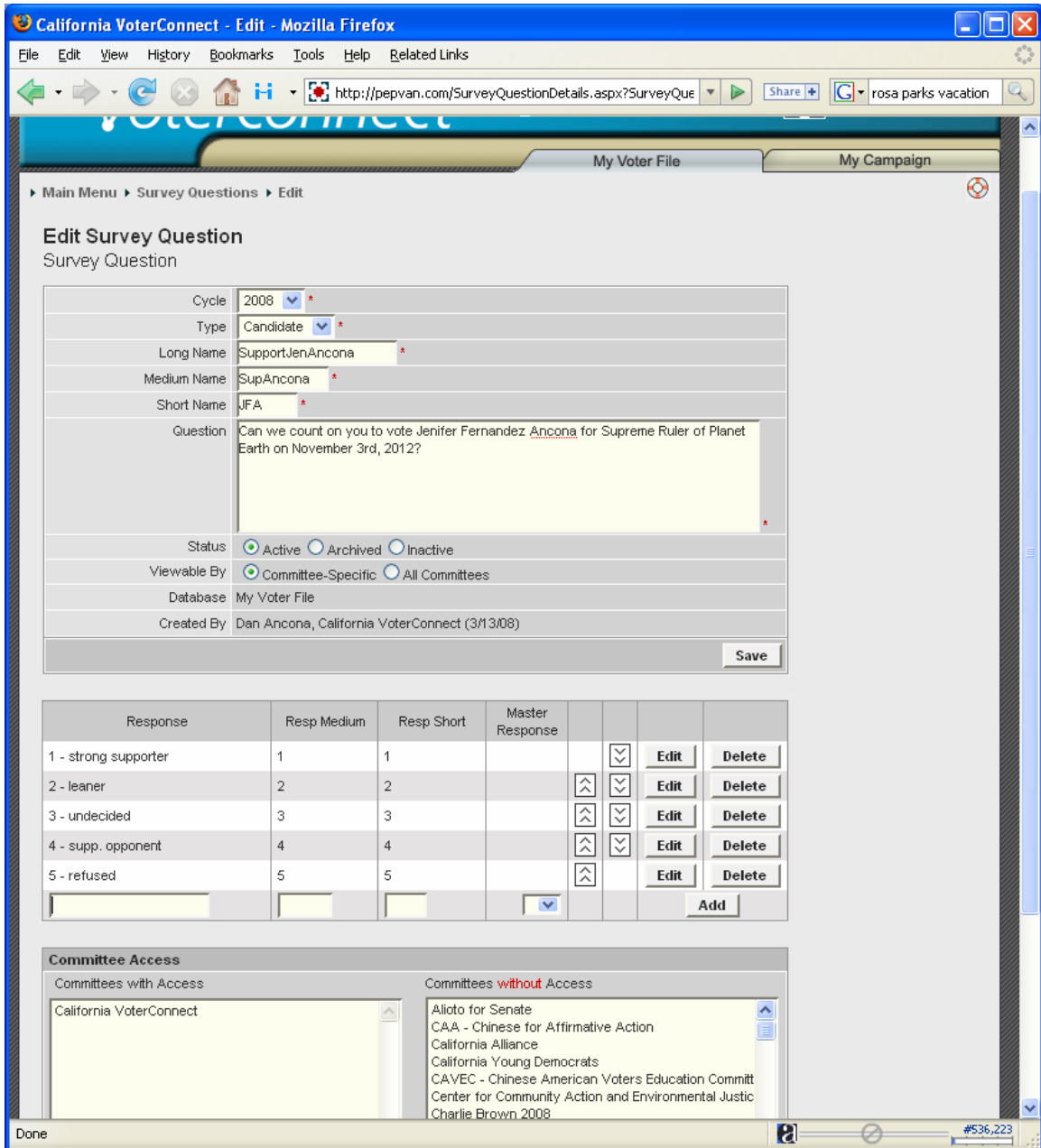
To fill this form out, pick the campaign cycle, question type, and then come up with long, medium and short names as well as a natural-sounding survey question. Make sure you pick "My Voter File" from the "Database" field, and hit Save:

The screenshot shows the 'New Survey Question' form in the California VoterConnect application. The form is titled 'New Survey Question' and 'Survey Question'. It contains the following fields and options:

- Cycle:** 2008
- Type:** Candidate
- Long Name:** SupportJenAncona
- Medium Name:** SupAncona
- Short Name:** JFA
- Question:** Can we count on you to vote for Jenifer Fernandez Ancona for Supreme Ruler of Planet Earth on November 3rd, 2012?
- Status:** Active (selected), Archived, Inactive
- Viewable By:** Committee-Specific (selected), All Committees
- Database:** My Voter File (selected), My Campaign

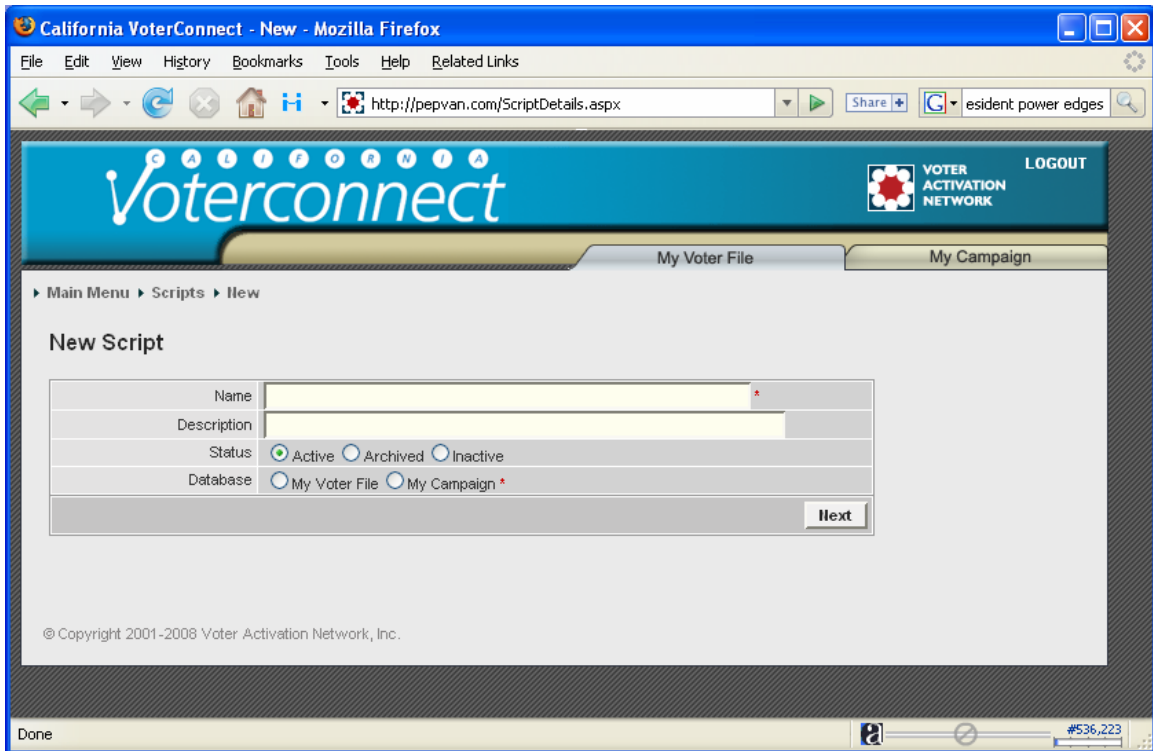
A 'Save' button is located at the bottom right of the form. The footer of the page reads '© Copyright 2001-2008 Voter Activation Network, Inc.' and the browser status bar shows 'Done' and '#536,223'.

From the next screen, you can do two things: add Responses, and share your question with other groups if you are working in a coalition with other groups that are also using the VAN. To add Responses, come up with the long, medium & short codes and hit the Add button for each of them. You can change the order of them with the arrows that point up and down next to the Edit and Delete buttons. The following screenshot shows a Survey Question with the commonly used 1-5 scale of classifying supporters.



Step 3 – Pulling it all together to make a script

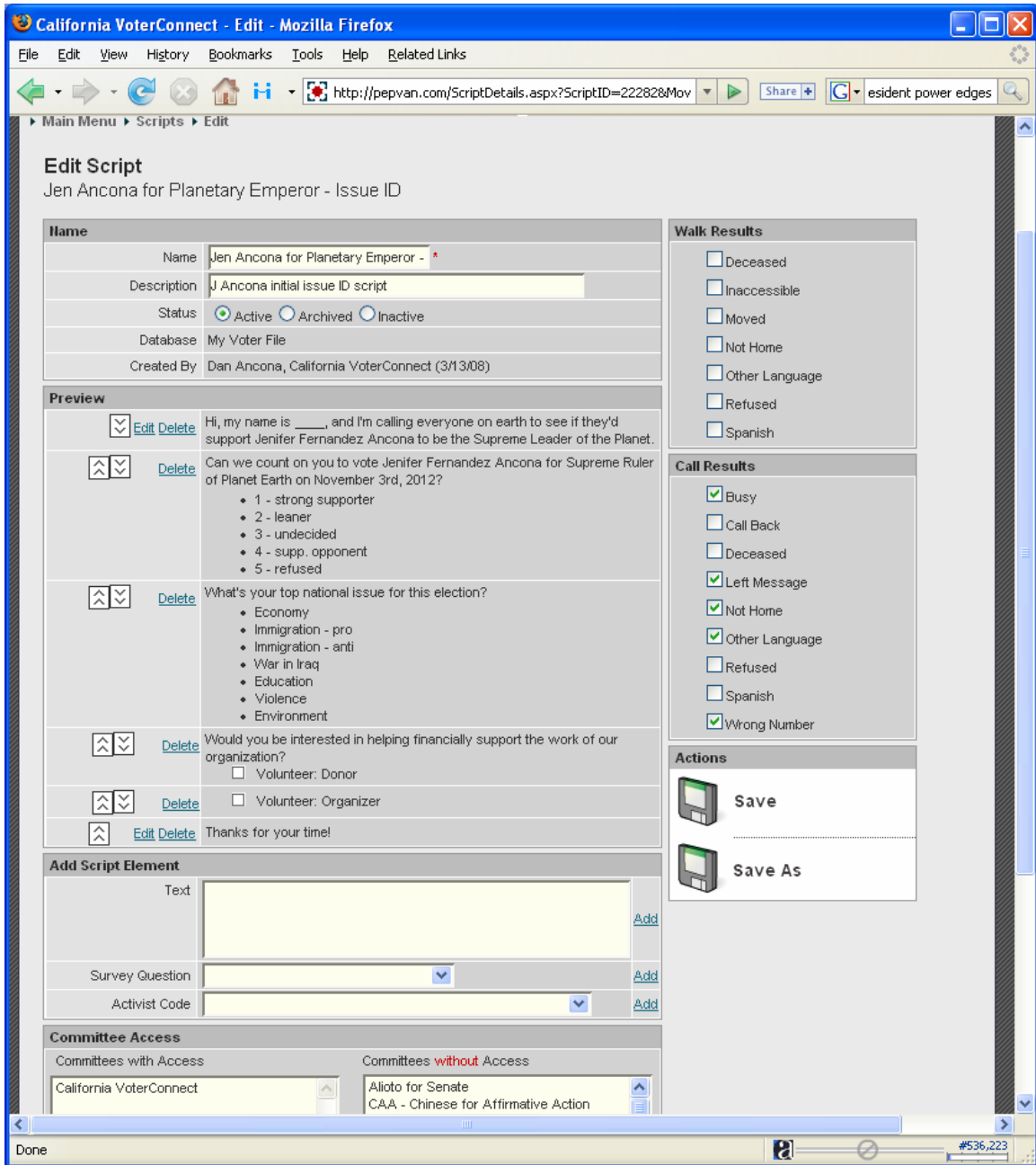
VAN Scripts are assembled from Survey Questions and Activist Codes, along with text boxes. Start again under “Codes – Questions – Scripts” and this time pick Scripts, and then New Script in the upper right hand corner. Come up with and type in the name and description and pick “My Voter File” as the Database:



From the next screen, you can assemble the parts of your script.

1. In the box labeled Text, put an introduction. Typically this is something like “Hi, my name is _____ and I’m calling from the _____ campaign. Have you been following the election so far?” Once you’re happy with it, click “Add” on the right side of the box. This will add the text you just wrote to the Preview box.
2. Next, pick a Survey Question and hit the “Add” button next to it. It will also be added to the preview. Repeat this again if you’d like to add an Issue ID question.
3. Add some activist codes by picking them and again using the Add button to the right once they are selected.
4. Add another text box with a closing statement thanking the voter for their time, if desired.

The final result is shown below. You can edit or delete each part that you’ve added with the appropriate links in the Preview box, and you can move the different parts up and down with the arrows on the left side.



That's it – hit Save, and your script is ready to go! You can use it for walk and phone lists, from the Script View or from a Virtual Phone Bank.