

# Electoral Organizing

VOCAL-NY Case Study



## **BEFORE YOU MATCH, CONSIDER:**

- What's your goal with matching?
- How will you segment in PB
- What's your timeline?
- What personal information is needed to match?

## MATCH REQUIREMENTS

Mandatory data needed (unless *ed)	Optional but ensures better match rates	So that you can load the data back into your system
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**Tips:**

- Leave cells where you are missing data blank.
- Don't use punctuation in suffix, address, or phone fields (ex: . , ( ) - #).
- Use "Apt" instead of "#" to indicate apartments.
- Make sure to include area codes in phone numbers. Phone numbers should be 10 digits long.
- Only use numbers in the phone number field—no dashes or parentheses.
- Use two digit abbreviations for states.

[illegible]

**Your data is in VAN, now  
what?**



My Voters

My Campaign

Search for a page

What's New?

## MAIN MENU

# Welcome Sam

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

## Quick Look Up



Quick Look Up

## Load Data



Quick Mark



Script View



Grid View



Form View

## Lists



Create A New List



Go to My List (0 People)



View My Folders

## Administrative Menu

- > MiniVAN
- > Exports
- > Letters
- > Phone Services
- > Codes • Questions • Scripts

## Organizations



Organizations

Build a List of Organizations

## Events



Create New Event



Calendar



Event List



Event Participant List

## PEOPLE

- Create a List
- My Folders
- My List (0 People)
- Quick Look Up

## ENGAGEMENT

- Event Attendee Check-In
- Event List
- Event Participant List

## DATA ENTRY

- Form View
- Grid View



My Voters

My Campaign



Home



Main Menu



Voter Contact

## PEOPLE



Create a List



My Folders



My List (214 People)



Quick Look Up

## DATA ENTRY



Form View



Grid View



Quick Mark



Script View

## ORGANIZING



Canvass Results

## MAIN MENU

## Welcome Sam

[My Requests](#)

0

[My Export Files](#)

0

[My PDF Files](#)

0

[Counts/Crosstabs Outputs](#)

0

[Follow Ups](#)

0

[Support Requests](#)

0

[Contact the Admin](#)[Request a User Account](#)

## Administrative Menu

[Settings and Preferences](#)[Polling Locations](#)[State Updates](#)

## Quick Look Up

[Quick Look Up](#)

## Lists

[Create A New List](#)[Go to My List](#) (214 People)[View My Folders](#)

## Canvassing

[Canvass Results](#)

## Load Data

[Quick Mark](#)[Script View](#)[Grid View](#)[Form View](#)

## Quick Tasks

[Manage Relations](#)[Virtual Phone B](#)

# Create A New Search

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

## FAVORITES

### ▼ Canvass Status



Include Only

people based on the following canvass results:

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Busy                 | <input type="checkbox"/> Gift             |   |
| <input type="checkbox"/> Call Back            | <input type="checkbox"/> Hostile          | <input type="checkbox"/> Other              |
| <input type="checkbox"/> Canvassed            | <input type="checkbox"/> Inaccessible     | <input type="checkbox"/> Other Language     |
| <input type="checkbox"/> Come Back            | <input type="checkbox"/> Language Barrier | <input type="checkbox"/> Out of Town        |
| <input type="checkbox"/> Cultivation          | <input type="checkbox"/> Left Message     | <input type="checkbox"/> Refused            |
| <input type="checkbox"/> Deceased             | <input type="checkbox"/> Lit Dropped      | <input type="checkbox"/> Robocalled         |
| <input type="checkbox"/> Deliverability Error | <input type="checkbox"/> Mailed           | <input type="checkbox"/> Sent Email         |
| <input type="checkbox"/> Disconnected         | <input type="checkbox"/> Moved            | <input type="checkbox"/> Spanish            |
| <input type="checkbox"/> Do Not Call          | <input type="checkbox"/> No Such Address  | <input type="checkbox"/> Talked but No Info |
| <input type="checkbox"/> Do Not Email         | <input type="checkbox"/> Non-Citizen      | <input type="checkbox"/> Texted             |
| <input type="checkbox"/> Do Not Text          | <input type="checkbox"/> Not Eligible     | <input type="checkbox"/> Wrong Number       |
| <input type="checkbox"/> Do Not Walk          | <input type="checkbox"/> Not Home         |   |

Campaign

Input Type

Contact Type

Any Pass

▼ Home Districts



Search for Districts that have been applied to a person's physical Voting Address.

County

Media Market

CD

2011-2021 Congressional

Senate

2011-2021 State Senate

Assembly

2011-2021 State Assembly

Rural Power District

Catalist School District

Unified School District

Non Investor Owned  
Electric Utility



## ▼ Voting History



Include anyone who did

At Least



2

of the following

<input type="checkbox"/> 2023 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input type="checkbox"/> 2022 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input type="checkbox"/> 2021 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input checked="" type="checkbox"/> 2020 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input checked="" type="radio"/> Mail <input type="radio"/> Polls
<input type="checkbox"/> 2019 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input checked="" type="checkbox"/> 2018 General	<input checked="" type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input type="checkbox"/> 2017 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input type="checkbox"/> 2016 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input type="checkbox"/> 2015 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input type="checkbox"/> 2014 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input type="checkbox"/> 2013 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input type="checkbox"/> 2012 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input type="checkbox"/> 2011 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input type="checkbox"/> 2010 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input type="checkbox"/> 2009 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls
<input type="checkbox"/> 2008 General	<input type="radio"/> Voted <input type="radio"/> Didn't Vote <input type="radio"/> Absentee <input type="radio"/> Early <input type="radio"/> Mail <input type="radio"/> Polls

▼ **Block-Level Census Data**



2010 Population From

To

2010 Population Over  
18 From

To

2010 Percent African  
American From

To

2010 Percent Native  
American From

To

2010 Percent Asian  
American From

To

2010 Percent Hispanic  
From

To

2010 Number of  
Housing Units From

To

2010 Percent Vacant  
Housing From

To

[{Check All}](#)

[{Un-Check All}](#)

**2022 GOTV: 2022AugVote** [\[Check All\]](#)

- ☐ Yes
- ☐ No
- ☐ Unsure

**2022 GOTV: 2022GEVoteCommit** [\[Check All\]](#)

- ☐ Yes
- ☐ No
- ☐ Maybe

**2022 GOTV: 2022GEVotePlan** [\[Check All\]](#)

- ☐ Polls
- ☐ Early
- ☐ Absentee
- ☐ Already Voted
- ☐ Unsure
- ☐ Not Voting

**2022 GOTV: 2022VoteAug** [\[Check All\]](#)

- ☐ Polls
- ☐ Absentee
- ☐ Early
- ☐ Already Voted
- ☐ Unsure
- ☐ Not Voting

**2022 GOTV: 2022VoteGE** [\[Check All\]](#)

- ☐ Polls
- ☐ Absentee
- ☐ Early
- ☐ Already Voted
- ☐ Unsure
- ☐ Not Voting

**2022 GOTV: 2022VotePE** [\[Check All\]](#)

- ☐ Polls
- ☐ Absentee
- ☐ Early
- ☐ Already Voted
- ☐ Unsure
- ☐ Not Voting

**2022 Issue: 22LegislativeIssue** [\[Check All\]](#)

- ☐ Yes
- ☐ No
- ☐ Maybe

**2022 Voter Reg: 2022 Voter Reg** [\[Check All\]](#)

- ☐ Yes
- ☐ No
- ☐ Maybe





Print



Letters



Labels



Calls



Export



MiniVAN



Counts



Reports



Cut Turf



Description

Last Name

Calls



- ☒ Set up Virtual Phone Bank List
- ☐ Set up RoboCall using 🔥 CallFire
- ☐ Set up RoboSurvey using 🔥 CallFire
- ☐ Set up Predictive Dialer Campaign

Next

Save Save & Finish



● Turf 1 (124/52)





Counts



- ☒ Run Quick Counts and Crosstabs
- ☐ Run Counts and Crosstabs with Format

Next

Search for a page

- Home
- Main Menu
- Voter Contact

- PEOPLE
- Create a List
  - My Folders
  - My List (214 People)
  - Quick Look Up

- DATA ENTRY
- Form View
  - Grid View
  - Quick Mark
  - Script View

- ORGANIZING
- Canvass Results
  - MiniVAN Campaigns
  - MiniVAN Commit
  - My Turfs
  - Virtual Phone Bank
  - Virtual Phone Bank List

Refresh Results

County	Not Home (# of Attempts)	%	Refused (# of Attempts)	%	Moved (# of Attempts)	%	Deceased (# of Attempts)	%	Canvassed (# of Attempts)	%	Total Attempts
Dutchess	0	0%	0	0%	0	0%	0	0%	1	100%	1
Nassau	605	70%	5	1%	41	5%	0	0%	164	19%	864
New York	1	50%	0	0%	0	0%	0	0%	0	0%	2
Onondaga	437	63%	0	0%	94	14%	1	0%	102	15%	689
Orange	25	74%	0	0%	0	0%	0	0%	1	3%	34
Putnam	1	50%	0	0%	0	0%	0	0%	0	0%	2
Queens	165	68%	11	5%	0	0%	0	0%	33	14%	243
Rockland	34	64%	3	6%	0	0%	0	0%	1	2%	53
Schenectady	1	100%	0	0%	0	0%	0	0%	0	0%	1
Suffolk	4	100%	0	0%	0	0%	0	0%	0	0%	4
Westchester	27	64%	2	5%	1	2%	0	0%	0	0%	42
Total	1,300	67%	21	1%	136	7%	1	0%	302	16%	1,935



# YOU MATCHED YOUR DATA TO THE VOTER FILE - NOW WHAT?

- Re-importing matched data.
- What can you do with this information?
- What do you *want* to do with it?