How to Use VAN for Census

Compliance Quick Facts

● Only 501(c)(3) organizations that have signed a 2019-2020 VAN MOU may access State Voices’ Tools.

● All VAN users with Standard User Level 1 access or above must be trained in the use of the State Voices’ Tools and compliance with their usage.
  ○ You must watch this video and complete the associated quiz with at least an 80% to be granted access to the State Voices VAN.

● By signing the MOU for Civic Engagement Data Access, your organization agrees to indemnify and hold harmless State Voices, VAN and Catalist from any third party claims for any breach of the terms in the MOU or federal or state laws by your organization, your officers, directors, employees, agents, volunteers or contractors related to the use of these tools.

● We contract with two organizations to provide data and tools to 501(c)(3) organizations like yourselves. One is Catalist and the other is NGPVAN.
  ○ Catalist provides, updates, and maintains the database.
  ○ NGPVAN is the website that is used to access the voter file database.

● Catalist owns the data provided by its contract with State Voices, including but not limited to:
  ○ Geographic and demographic information about people found in the VAN (voters and now Melissa data address data).
  ○ Model scores

● Generally, data added by our partner organizations belongs to the partner. This includes:
  ○ Activist Codes
  ○ Survey Responses
  ○ Email addresses
  ○ Other data your organization inputs

● All vendors that are provided any access to the data must be approved in writing by Catalist by sending them an approved vendor form.

Melissa Data Quick Facts

● Melissa Data gets its data directly from the USPS - United States Postal Service. The USPS doesn’t sell address data directly - you have to go through a contractor like Melissa Data, so the only errors you get in this dataset are the occasional typos.

● Melissa Data is the largest provider of addresses for direct mail in the United States.

● Melissa Data will likely provide little to no lift in Native American reservations addresses due to the fact that Native American reservations don’t use the USPS.

● Catalist has purchased address data from MelissaData which has been loaded to VAN as part of its contract with State Voices.

● The Melissa Data in VAN is address and district data only. This means that the data will not include names or any other type of information, such as data model scores, etc.
The Data in VAN

- Data is collected by Catalist from the secretary of state's office. Catalist then adds commercial and specialty data (models, scores, etc.). VAN - Voter Activation Network takes that data and allows us to access it through its website: van.statevoices.org

- VAN consists of three databases - My Voters, My Campaign, and the Voter Registration Tool.
  - There is a 4th paid database for digital organizing and fundraising called EveryAction.
- When people think of VAN they usually think of My Voters, which is the voter contact portal.
- Historically My Voters has contained data on both registered voters and unregistered voters. With Catalist's purchase of address data from Melissa Data, the VAN now includes about 94% of all residential addresses in the United States.

List Building Theory

- Creating lists in VAN isn’t always the most straightforward. It requires some thought to ensure you’re not accidentally excluding the very people you want to talk to or including those you don’t.
When creating lists using the VAN modules in the create a list menu, you are primarily dealing with two types of functions. The two functions are:

- OR functions
- AND functions

OR functions return values if any of the conditions are true

- Example:
  - Create a list of people who are Hispanic or Black or AAPI people
  - This list is an OR function list because people will only fit one of the race categories based on the race assigned to them in VAN.

AND functions return values if all of the conditions are true

- Example
  - Create a list of voters who are black and young and women.
  - This list is an AND function because you're looking for a very specific subset of folks. That subset can be seen in the image below.

Both of the examples above are good examples of one step lists.
Multistep Lists

- Multistep lists differ from one step lists in the fact that you can “add” people who meet new criteria, “remove” people who meet new criteria, or “narrow” the list by a set of new criteria.

- Here’s an example of a multistep list where you’re “adding” steps: A list that includes voters who are People of Color, plus voters who are women, plus voters who are young. The difference between this multistep list and a list like that under the “AND” function is that these groups are being added in addition to each other, instead of in the same step.

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>African American</td>
<td>257,293</td>
</tr>
<tr>
<td>Asian</td>
<td>154,981</td>
</tr>
<tr>
<td>Hispanic</td>
<td>499,562</td>
</tr>
<tr>
<td>Single Women</td>
<td>976,897</td>
</tr>
<tr>
<td>Age 18-34</td>
<td>728,046</td>
</tr>
</tbody>
</table>

- Here are some basic counts to keep in mind. They will come in handy as we go through this example.

- If we were to create this list in VAN for the state of Nevada it would look like:
  - Step one: Select Asian, Hispanic, Black voters in CAL (Create a List)
  - Step two: “Add” unmarried women in CAL
  - Step three: “Add” young voters (18-34) in CAL
  - Final List: 1,898,428 people. Now, if we go back to the above table with counts and add up all the categories we get a total of 2,616,779 people.

- The reason that these counts are different is because people can belong in more than one category. For example, people can be both African-American and a single woman, and we wouldn’t want to count them twice.

- However, when we add a step that adds a new category, we are only adding the people who meet the new set of criteria, but perhaps also fit the criteria prior to that and so forth. So instead of creating a subgroup of people who are POC and women and young, we are telling the VAN to give us a list of POC voters, women voters, and young voters. Essentially allowing people to meet any combination of the criteria.
○ Someone could be an unmarried woman between the ages of 18-34, but not a POC and end up on our list.
○ Someone else could be over the age of 34, but because they’re POC also end up on our list.

● Now that we’ve walked through an example of how to add, let’s talk about how to narrow a list. While you can narrow a list multiple steps along the way, selecting a county at every step during our previous example might get too hard to manage.
○ In a case like that it would be best to pull your list of criteria and narrow to a county in the final step for simplicity and to ensure you don’t make a mistake.
○ Taking our list from above of 1,898,428 people and narrowing to those in Clark County, Nevada, we get a list of 1,451,658 people.
○ We get that list by doing the following:
  ■ Step one: Select Asian, Hispanic, Black voters in CAL
  ■ Step two: “Add” unmarried women in CAL
  ■ Step three: “Add” young voters (age 18-34) in CAL
  ■ Step four: “Narrow” to Clark county in CAL

Where to Find Melissa Address Data
1. Log in to the VAN by going to van.statevoices.org
2. Once you’ve logged into the VAN, you’ll be directed to the main page. Before you start creating your list, double-check that you’re in the correct VAN database. If you’re creating a voter contact or Census contact list you’ll want to make sure you’re in the My Voters database.
3. Once you’re sure you’re in the correct database, direct your mouse to the Lists section of the main page and click on Create a New List.
4. Once in the Create a List menu find the Voter Status and Voter Registration module. In the module you'll notice that there are a few pre-selected statuses. You will also notice that there's a status called “New Address”. That’s the status that you should select when you want to use the Melissa Address data in your lists.

**Voter Status and Voter Registration**

**Voter Status**

- Registered Active
- New Address
- Dropped
- Registered Inactive
- Multiple Appearances
- Unregistered
- Applicant

**How to Target Hard to Count Tracts**

- To find out which census tracts in your state are hard to count, State Voices recommends using the [Census Hard to Count Map](#). You can also view this recording on how to use the Census Hard to Count Map.
- If you need additional help on targeting census tracts, contact your state table data staff. If you’re in a non-table state, contact Tools for All Support at tfasupport@statevoices.org.
How Use Melissa Address Data

- Creating lists for Census work will be very similar to creating lists for GOTV and issue work. The main difference will be that instead of narrowing your list to People of Color you will be removing Caucasian people from your list. This will ensure that you don’t remove People of Color (POC) and that you don’t remove any of the Melissa Data addresses.
  - When creating Census lists using Melissa Data, keep in mind that the address data doesn’t have model scores appended to it. Race and ethnicity in the VAN are modeled pieces of data, so if you narrow your list to a particular race or ethnicity, you would be eliminating the Melissa Address data from your list.

- Step 1: Go to “Home Districts” and select a county from the drop down menu.
- Step 2: Once you’ve selected your county you will see that the “Home Districts” menu gets a little longer because a new field option has appeared in the drop down menu called “Census Tract”.

![Home Districts](Image)
You can either select only one census tract by using the drop down menu or you can click the hyperlink and select multiple census tracts.

We recommend selecting multiple census tracts since it’s not likely you will only be targeting one census tract.

If you are planning to cut turf for door knocking, simply be sure to keep your door count under 7,000 to be able to use the turf cutter. If you go over 7,000 households, that option will not be available.

- Step 3: Go to “Voter Status and Voter Registration”
  - Select all the boxes except “dropped”. We don’t recommend you use the dropped status, as that data is bad.

- Step 4: Go to “Suppressions” and make sure it looks like the following:

  ![Suppressions](image)

- Step 5: Go to “Add Step” and select “Remove People”
● Step 6: Go to “Race/Ethnicity” and select “Caucasian” to remove Caucasian people from your list without removing the new address data.
● Step 7: Go to “Suppressions” and select the same exact suppressions you selected in step 4.
● Step 8: Go to “Voter Status and Voter Registration” and select the exact same boxes as in Step 3.
● Step 9: Once you have the list you want, run your search and you’ll be taken to the “My List” menu where you can cut turf for canvassing, create a virtual phone bank, export a mailing list, or send your list to a texting platform via an API key.

**Data Entry for Census Pledges**

● There are three methods of data entry for Census Pledges.
  ○ The first option is via online census pledge. State Voices is offering partners the option of using a free digital census pledge card via ActionNetwork that would sync to VAN via an API key. These will be labeled with a private and public Activist Code named “Census: Pledge: ActionNetwork.”
The second option State Voices is offering isn’t free. There is an ~ $.23 cents per card cost to partners for using this method. This method involves scanning pledge cards that are uploaded by state data staff or TFA support to a system called the SV Magic tool, where they are sent via an API key to a data entry software called Vidado. From Vidado, the data flows to VAN via API key. These will be labeled with a private and public Activist Code named “Census: Pledge: Paper-Magic.”
To learn more about the first and second options, contact your state data staff or TFA support.

- The final option is free, but requires staff/volunteer time. It’s a manual data entry process via the VAN’s “Quick Look Up” menu.

To enter data via the QLU data entry method. Find the QLU menu on the VAN main page.
In the street address look up, enter the address from the pledge card you collected.

- Once you’ve entered the address, you will see one of two things.
  - You’ll either see a person’s first name and last name or you will see “Unknown, Person 1 or 2”. “Unknown” people are address records that were acquired via Melissa Data. That also means there’s no person level data for these records.

- Next, click into the record and scroll to “custom contact fields”.

- Once you’ve scrolled to “custom contact fields” and have clicked the expand menu carrot you will see an option to type in the name information of that “unknown person”.

- While you’re in the person’s profile you can also enter any other information you collected. Such as email and phone number.
Once you're done, be sure to click “Save All” to save all your edits.
Census Reporting

Reporting Data Sources

2020 Reporting will originate and be distributed from the national level from the following sources and will be reported by state and committee:

1. **VAN’s My Voters**: Contacts by Campaign pulled by VVN
   a. Walk: MiniVAN, Bulk Uploads, Data Entry
   b. Call: VPB, Predictive Dialer, RoboCalls, Robosurveys, Bulk Uploads, Data Entry
   c. Text (*not including texts sent through state table contracts with Hustle and GetThru*): Bulk Uploads, API
   d. Mail: Bulk Uploads, Data Entry

2. **VAN’s Voter Registration Tool**: Registrants uploaded in non-Voter Registration Project states deduped by VVN

3. **Blocks**: Registrants in Voter Registration Project states deduped by VVN

4. **Hustle**: Texts sent and received through state table contracts reported from the vendor

5. **GetThru**
   a. Texts sent and received through state table ThruText contracts reported by the vendor
   b. Call Contacts made through state table ThruTalk contracts reported by the vendor

6. **Action Network**
   a. Census Pledges\(^1\): deduped by VVN
   b. GOTV Pledges\(^2\): deduped by VVN

7. **Reach**
   a. Metrics to be determined

8. **SV Magic Tool**
   a. Census Pledges\(^3\): deduped by VVN
   b. GOTV Pledges\(^4\): deduped by VVN

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\(^1\) How to find online Census Pledges in VAN from Action Network: Search for Activist Code named “Census: Pledge: ActionNetwork.” The private version of the AC will pull pledges collected in the state by the committee logged into. The public version of the AC will pull pledges collected by all committees in the state.

\(^2\) How to find online GOTV Pledges in VAN from Action Network: Search for Activist Code named “Voter Contact: 2020GOTV: Pledge:AN.” The private version of the AC will pull pledges collected in the state by the committee logged into. The public version of the AC will pull pledges collected by all committees in the state.

\(^3\) How to find paper Census Pledges from Magic in VAN: Search for Activist Code (AC) named “Census: Pledge: Paper-Magic.” The private version of the AC will pull pledges collected in the state by the committee logged into. The public version of the AC will pull pledges collected by all committees in the state.

\(^4\) How to find paper GOTV Pledges from Magic in VAN: Search for Activist Code (AC) named “Voter Contact: 2020GOTV Pledge:Magic.” The private version of the AC will pull pledges collected in the state
c. Registrations will be counted through the VRT

9. Report from **Voter Participation Center** sent to State Voices in November
   a. Mailings Sent
   b. Registrations Collected

10. **State Voices Census Reporting Google Form**
    a. Community-led questionnaire assistance centers
    b. Kiosks
    c. Events
    d. Emails
    e. Cell Phone Opt-ins

**VAN’s Campaigns**
State Voices has created 4 campaigns for 2020 that state data staff need to share with all of the c3 committees in their state.

1. 2020 Census
2. 2020 General Election
3. 2020 Primaries & Caucuses
4. 2020 Policy Advocacy & Education

The bulk of 2020 reporting will happen through the Campaigns feature in VAN’s My Voters. The purpose of Campaigns is to break out all contacts that happen related to a specific project, or ‘campaign,’ and will primarily be beneficial for purposes of reporting our work to funders and stakeholders at the end of the year. Data can be added to Campaigns in 3 ways:

1. Add a Campaign to a Script
   a. To assign a campaign to a script:
   b. Please note that assigning a campaign to a script only works for future data applied. It does not assign a campaign to any data that you’ve already collected.
      i. Step 1: Go to “Codes, Questions, Scripts” in the VAN main menu. Click on “scripts”

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by the committee logged into. The public version of the AC will pull pledges collected by all committees in the state.

Registants from VPC are uploaded weekly to VAN’s My Voters State Voices committee with the public Activist Code “2020 VPC Voter Reg”
ii. Step 2: Once on the next page, click “Add New Script”

iii. Step 3: Once in the script creation page, name your script, but most importantly, select the campaign that best fits the program you are running with that script.

iv. Step 4: Once you’ve set up your script, finish putting it together by adding text, survey questions, and activist codes.

2. Bulk Upload new Canvass Results and Survey Question Responses with a Script

3. Submit a support ticket to VAN with the following information to apply a Campaign to canvass results and Survey Question Responses that are already in My Voters:
   a. Committee Name and ID Number
   b. Date(s) of Contact
   c. Contact Type: Walk, Call, Text, Mail
Reporting Formats and Delivery
State Voices has developed a simple reporting format for program support and table development. National and state-level activity reports are generated and released on a scheduled basis.

<table>
<thead>
<tr>
<th>Type</th>
<th>Monthly</th>
<th>Quarterly</th>
<th>Annual</th>
</tr>
</thead>
<tbody>
<tr>
<td>State</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>National</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

These reports detail contacts our partners made on the ground using phone, walk, mail and text methods with voters. Here the Data and Technology team highlights some quick business intelligence on civic engagement activity by state and committee, including insights on highest week’s of contact and contact leaders.

National Activity Report

<table>
<thead>
<tr>
<th>State</th>
<th>Walk Contacts</th>
<th>Call Contacts</th>
<th>Text Contacts</th>
<th>Mail Contacts</th>
<th>Voter Registrations Collected</th>
<th>Total Contacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>AL</td>
<td>10,000</td>
<td>8,000</td>
<td>15,000</td>
<td>109,000</td>
<td>500</td>
<td>132,500</td>
</tr>
</tbody>
</table>

State Activity Report: Alabama

Committee | Walk Contacts | Call Contacts | Text Contacts | Mail Contacts | Voter Registrations Collected | Total Contacts |
-----------|---------------|---------------|---------------|---------------|------------------------------|---------------|

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6 Activity reports are generated and distributed on this tentative schedule: monthly - ten days from the close of the month; quarterly - fifteen days from the close of the quarter; annual 30 days from the end of the calendar year

7 Total contacts are a sum of all contact types (walk, phone, text, mail)
### National Activity Report Dashboard

More insights from the State Voices National Data and Technology team can be found on our [National Activity Report Dashboard](#).

### All Data in all Campaigns Combined by State and Committee

<table>
<thead>
<tr>
<th>State</th>
<th>Committee</th>
<th>Walk Contacts</th>
<th>Call Contacts</th>
<th>Texts Sent</th>
<th>Texts Received</th>
<th>Mail Sent</th>
<th>Voter Registrations</th>
<th>Pledges Collected (Census)</th>
<th>Pledges Collected (GOTV)</th>
</tr>
</thead>
<tbody>
<tr>
<td>AL</td>
<td>State Voices</td>
<td>9,000</td>
<td>6,000</td>
<td>10,000</td>
<td>1,500</td>
<td>90,000</td>
<td>50,500</td>
<td>3,700</td>
<td>5,000</td>
</tr>
</tbody>
</table>

### Example: 2020 Census Campaign

*This will be a subset of data from All Campaigns*

*This report will also include state totals

**A semi-final version of this report will be released in August 2020, with the final version being included in our end of year report.

<table>
<thead>
<tr>
<th>State</th>
<th>Committee</th>
<th>Walk Contacts</th>
<th>Call Contacts</th>
<th>Texts Sent</th>
<th>Texts Received</th>
<th>Mail Sent</th>
<th>Census Pledges Collected (Paper)</th>
<th>Census Pledges Collected (Online)</th>
</tr>
</thead>
<tbody>
<tr>
<td>AL</td>
<td>State Voices</td>
<td>3,000</td>
<td>6,000</td>
<td>8,000</td>
<td>500</td>
<td>50,000</td>
<td>200</td>
<td>800</td>
</tr>
</tbody>
</table>