Missouri Democratic Party VAN Guide

Last Update: November 3, 2023

Introduction

The MDP data team created this VAN Guide to provide an easy-to-use explainer for campaign staff and volunteers alike. Below, we cover key features of VAN/Votebuilder as a platform, and specifics on the way the MDP data team administers VAN. This document falls somewhere between a manual, a FAQ sheet, and a user's guide.

Have a question that's not on here? Email vansupport@missouridems.org

Special acknowledgements to the Texas Democratic Party, whose TX VAN FAQ served as a guiding document for our own.

Please note: This is a living document and we will revise it as needed. We will note the date of revision at the top of the document.

What is VAN/Votebuilder?

VAN (Voter Activation Network)/VoteBuilder is software used nationwide by Democrats, Democratic campaigns, and progressive organizations to manage voter data and perform voter contact. When you contract for VAN with the Missouri Democratic Party, you receive:

- The Voter File, updated with new voter information on a monthly basis.
- Information matched to a voter's record by the DNC and other partners
- Demographic information on voters.
- Phone numbers, including cell phone numbers from MDP and DNC acquisitions at no additional cost to your campaign.
- A software platform you can use for canvassing, phone banking, text banking, mail, digital ads, and other voter contact
- A database where you can record results of voter contact and info voters share with you
- Scores & targets you can use to identify the best voters to contact for persuasion, get-out-the-vote efforts, and other outreach.
- Access to pre-negotiated rates for digital tools such as Hustle & auto dialers.

The rest of this document will outline different ways to utilize VAN for your campaign or committee outreach efforts.

Who can utilize this MDP Resource?

The current MDP VAN Policy is located here & our pricing guide can be found here. Democratic candidates will find VAN access a quick and straightforward process; for nonpartisan candidates, requirements are slightly different; please review the VAN policy carefully for details.

If you have additional questions about the policy or our pricing, please contact vansupport@missouridems.org.

How do I get access to VAN?

Partisan candidates (listed on ballot as Democrats)

Please go to www.missouridemocrats.org/data-resources to find both the general MDP VAN Agreement and the agreement used by HDCC (State House candidates only). Please fill out & sign that agreement, and e-mail the filled out agreement to vansupport@missouridems.org (or zach@mohousedems.com for State House candidates).

If you need to pay for access to VAN, please go to VAN Payments and make the appropriate payment. You can find the VAN/VoteBuilder Pricing Guide on the Data Resources page as well.

Nonpartisan candidates

County Committee Chairs may authorize local candidates for non-partisan electoral races to access VAN provided the candidate is considered a Democrat by the committee and has paid party dues. Local candidates will be given, as close as possible, access to their particular district utilizing pricing in Section 1 of the MDP Pricing Guide. In the event a district overlaps counties, all County Chairs must approve the candidate's access.

In order to set up access for nonpartisan races, the MDP will need:

- A completed and signed user agreement
- Payment of any applicable license fee and dues
- For local offices: a list of precincts in the district

- The MDP can set up statewide, countywide, congressional district, or legislative district access. For other districts, please provide a list of precincts. Your county board of elections can generally provide this.

The Basics

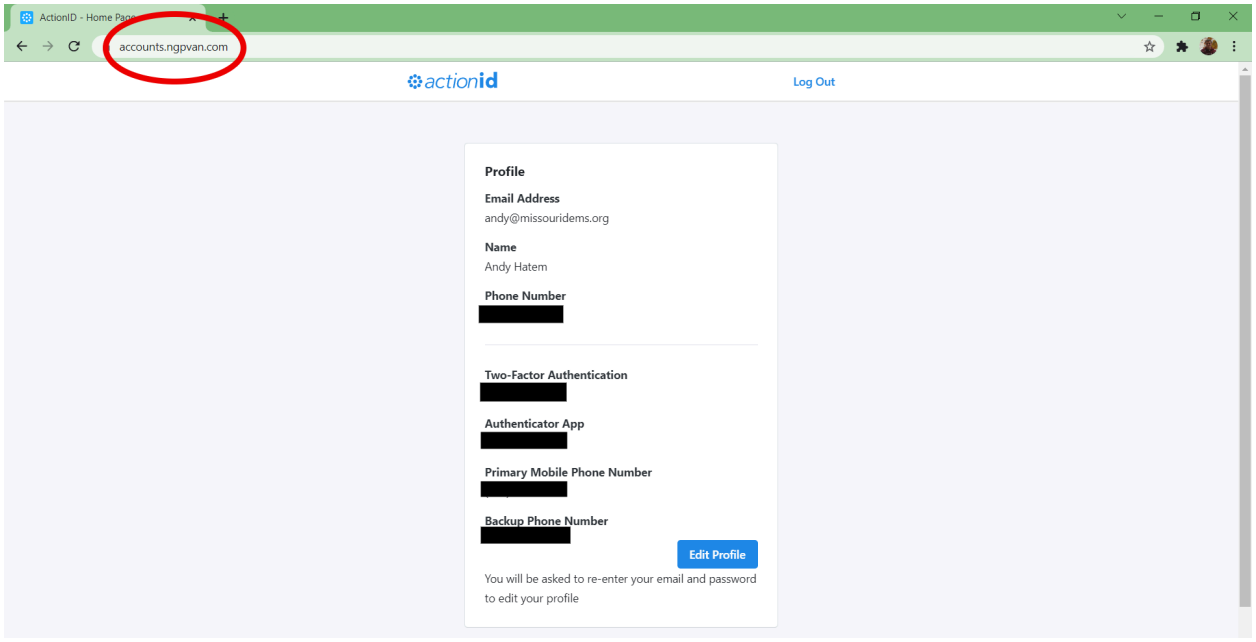
This section contains material on how to log in to VAN, who to contact for VAN Assistance, and how to contact them.

Logging Into MDP VAN

How do I log into VAN?

Go to **www.votebuilder.com** and click **Log in with ActionID**. If you do not have an ActionID, please follow the prompts to create an ActionID. If you are added as a user by an administrator, you will get an automated email to create an ActionID from the software. Please note: you will need to set up Two-Factor Authentication on your user account (see the DNC Guide for details on Two-Factor Authentication)

We sometimes get questions from users who've been redirected to the page shown below. This typically happens after you update your ActionID login details. This page lets you manage your ActionID (login info for VAN), but does not link to VAN itself (note the URL below is different). To reach VAN, type **www.votebuilder.com** into your browser's address bar.



I forgot my password for my ActionID - what do I do?

Click **Forgot my password?** on the ActionID login screen after you click on **Log in with ActionID** on **www.votebuilder.com** and follow the prompts.

Note: Do not use the "Forgot my password?" link under the "Log In with Account Name" button on www.votebuilder.com. You can no longer log in with an account name.

How do I know where to get VAN Help?

For general inquiries, please email vansupport@missouridems.org or fill out a support request within the platform.

Are there any available video trainings?

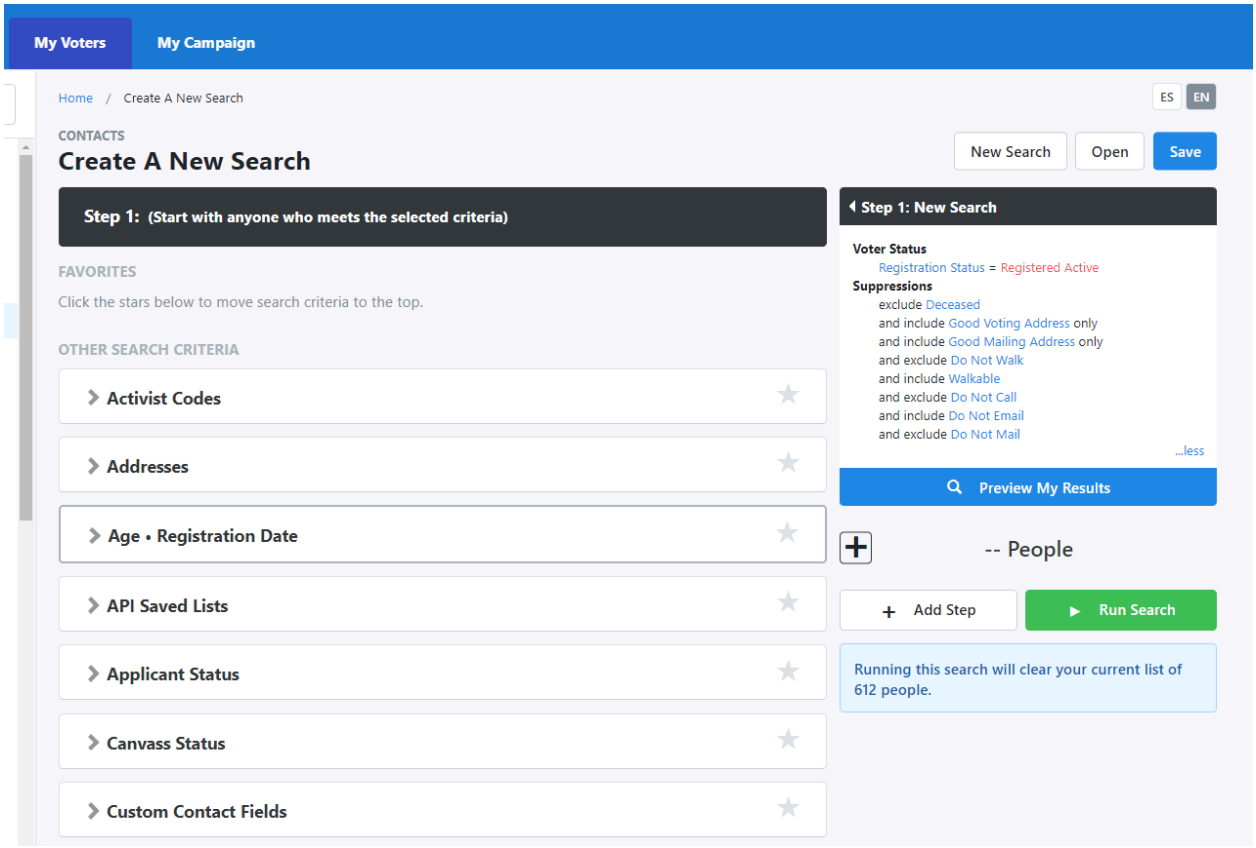
- **The Minnesota Democratic-Farm-Labor Party has created a series of VAN training videos.** These cover the following topics:
    - General overview of VAN
    - The Quick Look Up tool
    - The Create a List tool
    - Virtual Phone Banks
    - MiniVAN
    - My Campaign Events
    - Data Entry
    - Report Formats

Key Features in VAN

Lists & Searches

Lists are arguably the most central feature in VAN. You'll begin most of your voter contact work by generating lists of voters to target for outreach.

In order to create a list, look for the **Lists** box in VAN's main menu and click on the **Create a List** button. You'll be taken to a screen similar to the one below.



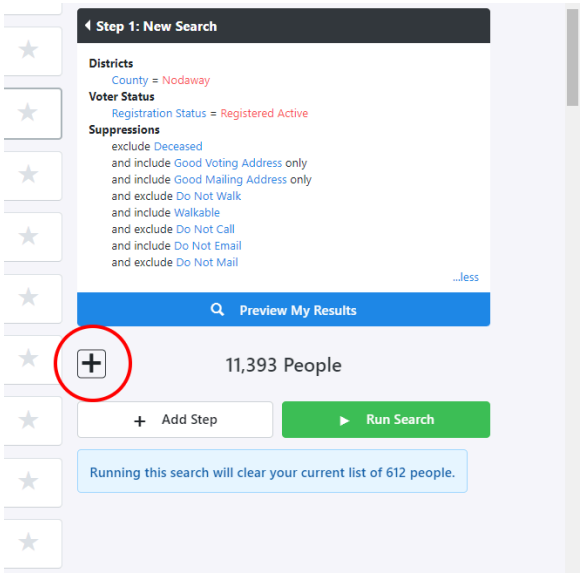
The dropdown menus under **Create A New Search** are all different methods by which you can filter a list of voters. For example, **Home Districts** let you search for voters by various geographies (for precincts, choose your county first, then a menu will pop up). **Scores** allow you to filter voters by their estimated likelihood of voting, supporting Dems, and/or responding to specific types of outreach. **Targets** let you use Missouri Democratic Party-created searches to find voters, and **Voting History** lets you filter voters by their voting record in prior elections.

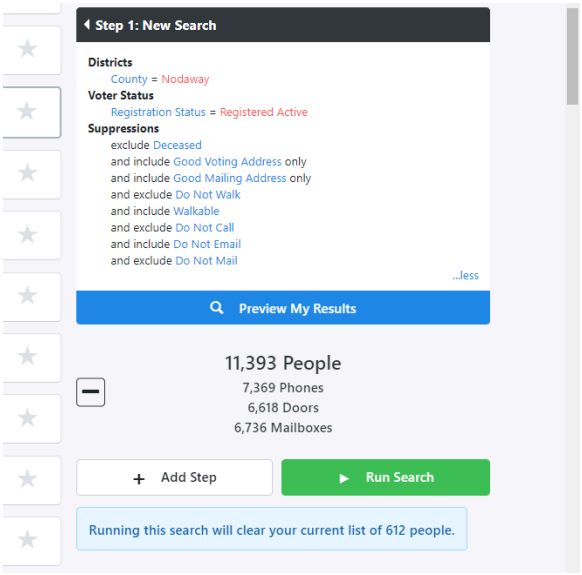
The MDP Data Team would like to highlight the **Suppressions** dropdown when creating a list. In general, we recommend **Removing All Suppressions** when creating a list for any purpose due to issues with data verification in the system.

As you set the filters you want to use for your list, you can click **Preview My Results** to see how many voters a list with your current settings will contain. You can also click the plus sign below **Preview My Results** to get the following counts for your list as it stands:

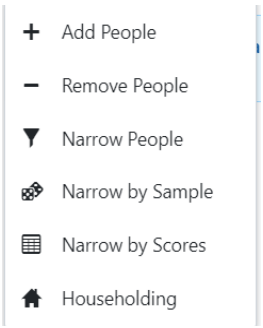
- Voters with at least one phone number listed
- Doors (unique voting addresses across the list)
- Mailboxes (unique mailing addresses across the list)

For many forms of outreach, it will make sense to plan around one canvasser visit per door, one mailer per household, one call/text per phone number, etc. These counts can help as you adjust list parameters to match your budget, volunteer capacity, and form of outreach.



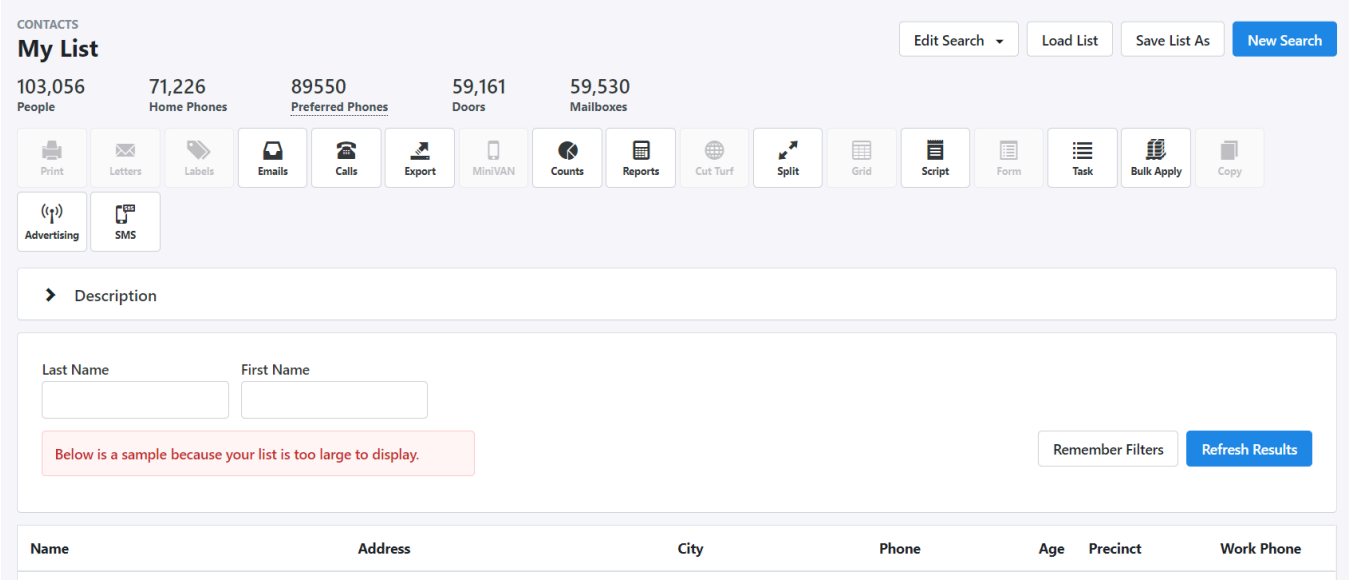


You can also set up searches with multiple steps by clicking **Add Step**.



Multi-step searches can be useful in many contexts. For example: you might want to generate a list of voters who turned out in your district's most recent primary ***or*** registered for the first time after the primary (i.e. they haven't had a chance to build a primary voting record). A search that simply filters for people who voted in the last primary would exclude the second group; you'd want to create a second step, and add any voter with a registration date after the last primary.

Once you have your search prepared, click "Run Search" and VAN will take you to the following page:



Up in the top right corner, you will see the Edit Search dropdown which will either take you back to your search, or let you add additional steps like before. You can also load a previously saved list, or create a new search. "Save List As" will allow you to save your search as either a List, which is static, or a Search, which is dynamic and updates nightly. When phone banking or canvassing, typically you should use a Saved Search.

We will go through many of the key buttons like “Calls”, “Cut Turf”, and “Reports in sections to come.

Scores & Targets

Political organizations and data consultancy groups create models to try and predict views and behaviors of voters. In VAN, those models output a “Score” for each voter based on the data we have on that voter. Campaigns can use scores to estimates the chances of a voter supporting some issue or identifying with a party/political leaning.

Campaigns that access VAN through the MDP are currently provided with 2 scores:

- The **DNC Dem Support Score** ranges from 0 to 100, and estimates a voter’s percentage odds of supporting Democratic candidates
- The **DNC/DCCC Clarity National Turnout Score** ranges from 0 to 100, and estimates a voter’s percentage odds of voting in a given cycle.

In addition to score parameters, the data team at MDP will create a number of targets that reflect the best data and research available to us. We encourage campaigns to use these to target voters and potential volunteers.

Once these targets are released, you can access them by going to **Create a List > Targets**. If you do not find targets there, contact vansupport@missouridems.org.

For more information on targets, go to the bottom of this VANual for targeting info.

If you have any additional questions about Scores/Targets, please contact vansupport@missouridems.org.

Survey Questions & Activist Codes

Survey Questions and Activist Codes are an immensely important part of collecting quality data from voter contact efforts.

Survey questions track information about a voter that can have several possible values. For example, a voter could strongly support the Dem candidate; lean towards the Dem candidate; be undecided; lean towards the GOP candidate; strongly support the GOP candidate; or intend to vote for a third-party candidate.

Activist Codes function more like labels - a voter is either in a group/category or outside it. From the MDP Data Team's perspective, important differences include:

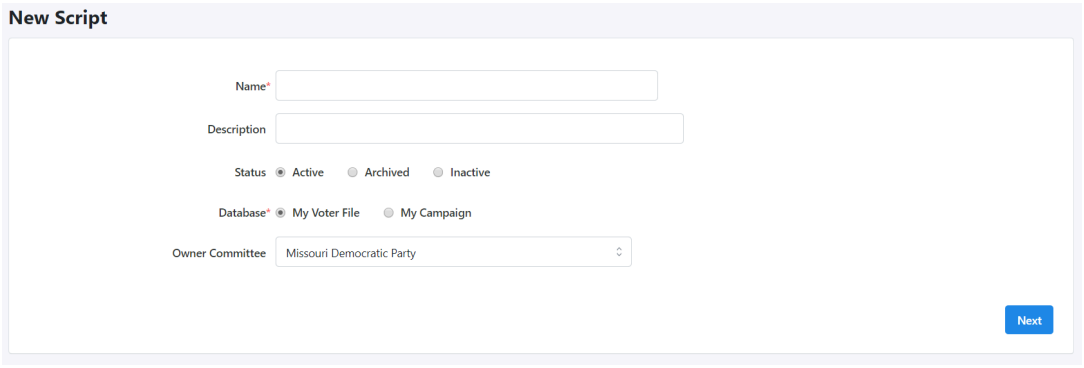
- Survey Questions allow a range of options of responses (for example, a scale from 1 to 5/Strong Dem to strong GOP). Activist Codes function more as a binary label: either you have the Activist Code applied to you or you do not.
- You cannot mark multiple responses on one Survey Question, but you can apply as many Activist Codes as you want to a voter. For example, you could use a Survey Question to ask for someone's top motivating issue, but you would want to use a number of Activist Codes if you want to mark more than one issue. (Note: You can manually enter multiple Survey Question Responses for someone in VAN, but not easily through MiniVAN).
- You may want to create a Survey Question if you care about both Yes and No results from a voter contact, as you can use "No" responses to include/exclude people in future lists. For example, a list for volunteer recruitment could exclude voters who've previously said they don't want to volunteer.

Since Survey Responses and Activist Codes are our primary voter contact data and we want to ensure quality data across the state, the MDP Data Team will administer the creation, editing, and management of both Survey Questions and Activist Codes to ensure data integrity across all Democratic campaigns.

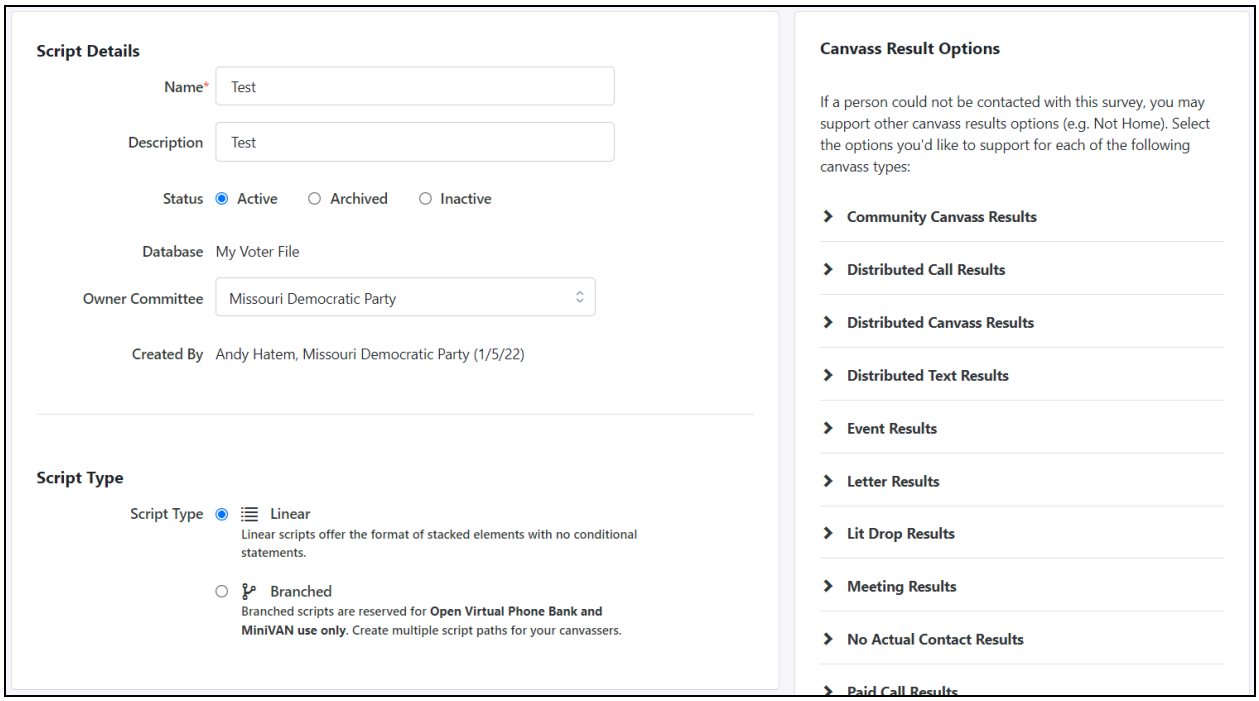
We will provide each campaign with two custom Survey Questions: Support and Volunteer, as well as access to a set of issue-based Activist Codes, a Yard Sign AC, and a Donor AC. If you would like to request additional SQs or ACs, please use this form.

Scripts

You will want to create a script for your staff and volunteers to use when they speak with voters and record information voters have shared. To create a script, find the **Administrative Menu**, open the **Codes ● Questions ● Scripts** dropdown menu, and click on **Scripts**. Once the **Scripts** page loads, click the blue button on the top right that says **Add New Script** to begin. You will then encounter the screen below.



You can assign the script to My Voters or My Campaign (See that section for more information). After you click **next**, you will be taken to this page:



This is where you can customize the text of the script, script type, and contact results available to volunteers and staff. You can give volunteers and staff the option to record a range of canvass results (not home, moved, wrong number, disconnected, deceased, etc.); survey responses; and activist codes. Once you are finished drafting, save the script. You can now use this script for canvassing and phone banking.

Phone banks

Phone banks are one useful way to contact voters, and VAN makes it easy to set them up!

Setting up a Virtual Phone Bank (taken from **TX Democrats VAN FAQ**):

- Once you've created a list, hit the **Calls** button and select **Set up Virtual Phone Bank List**
- It is important to use **saved searches** rather than **saved lists**. This ensures your phone bank will cover all current voters, and automatically filter out people we know have moved/been removed from voter rolls.
- You'll be prompted to select a name for the Virtual Phone Bank and choose a script. You can also add an (optional) **Description** with more details about the Virtual Phone Bank.
- You'll have the option to adjust **Display Settings** and set up **Editable Contact Information** for volunteers. This allows volunteers to make a note of a voter's preferred phone number or contact method.
- Next, you can select dates and times the Virtual Phone Bank will be available. A good rule of thumb is to stop calls at 8 pm. You can also limit callers to a certain number of minutes or calls. This is useful for reviewing the work of new callers.
- You can then choose whether or not to show volunteers a progress bar (showing how much of the list has been called) and a list of other people in a household (if volunteers reach someone other than the voter). You can also toggle on/off the option for callers to skip a voter, and whether volunteers try one or all listed phone numbers.
- Finally, you have the option to make a Virtual Phone Bank publishable to openvpb.com. Open VPB is useful because it creates a link you can share with volunteers. Volunteers who don't have a VAN account can create an OpenVPB account and start calling in minutes.
- When you click **Next**, you'll see a VPB code and (if you published the phone bank to OpenVPB) a link you can share with callers. There is also an option at the bottom of this page to give specific users, user groups and committees access to the list. Our recommended first step is to give your committee access, then click **Save** to complete the process.
- You can now return to this page to manage or edit the Virtual Phone Bank by finding the **Administrative Menu**, clicking **Phone Services**, and then selecting **Virtual Phone Bank**.
- Once you've finished calling through a virtual phone bank list, click **Send to Round 2** to refresh the phone bank list. This will remove voters you reached in round 1 and run the search you're using again on current voter data. New

voters who meet the filters in your search will be added. People who've dropped off the voter rolls will be removed. And people with new data (movers, wrong numbers, etc.) will be removed if your search is set up to filter them out.

Using a Virtual Phone Bank (credit to the **TX Democrats VAN FAQ**):

- To get started, select **Virtual Phone Bank** from **Quick Tasks** on the bottom right of the **Main Menu**
- If you've shared the virtual phone bank with your whole committee, it should be included in the list shown on this page. If not, you can enter a VPB number here.
- If you are giving someone an OpenVPB link, they won't need to go through the steps above. They *will* need to create or log in with an Action ID, but this is much quicker than creating a full VAN account. The other steps listed below are the same
- The next screen will give you instructions for making a call. When finished reading, click Next.
- Call the number at the top of the screen or click **Skip** to move to the next number.
- If you are not able to talk to the person, select **I couldn't reach (name)**.
    - This will bring up a list of reasons you might not reach a person. Select the relevant reason
- If you reach a person, go through the script. Mark survey responses/activist codes as needed.
- If you reach someone else in the household, find that person in the list of other household members shown. For example, say you are trying to reach James but instead reach Judy. Click on Judy's name. This will allow you to enter contact results/survey responses/activist codes for Judy.
- When you're done recording results of a call, select **Save & Next Call**.
- Multiple Phone Numbers:
    - If a person has multiple phone numbers on their record, you will see Number 1 of __ underneath the phone number.
    - The first number shown is likely their preferred number and the number you should start with. If you are unable to reach the person, you will have the option of skipping to the next person or trying the second number.
    - When trying the next number, the first number you tried will be crossed out. The next number will appear below. Call the number and proceed to fill out any results.
- Note that if you enter a response that indicates the person does not want to be contacted or cannot be contacted again, you will only have the option to choose **Skip** or **Save & Next Call.**

Text Banks

Text Banks are another useful way to contact voters, and since 2016 we've seen explosive growth in the number of companies offering text services to campaigns. Many of these services can pull data from VAN and sync back texting results. The MDP data team can help connect your texting service to VAN (further details below)

We strongly encourage you to contract with a text vendor active in the political space. Political campaigns face special rules and requirements for text campaigns. Many commercial text vendors are unfamiliar with these requirements and inexperienced with other campaign tools. One common pain point is text platforms that can't sync data to and from VAN automatically. Contracting with a vendor that works regularly with campaigns can save you a great deal of time and trouble.

API Integration Set-Up Guide

1. Log in to votebuilder.com
2. Scroll to **Administrative Menu** at bottom of page
3. **Integrations** > API Integrations > **Request an API key**
    a. Note: In general, Committee Admins should request API Keys. If you are a Campaign Manager-profile, you can also request a key via Support Requests and we will work with you that way.
4. Select your vendor's name > Send request to Andy Hatem
5. Once the API is approved you can generate an API key for your outreach tool by selecting **Generate API key** on the API Integration page

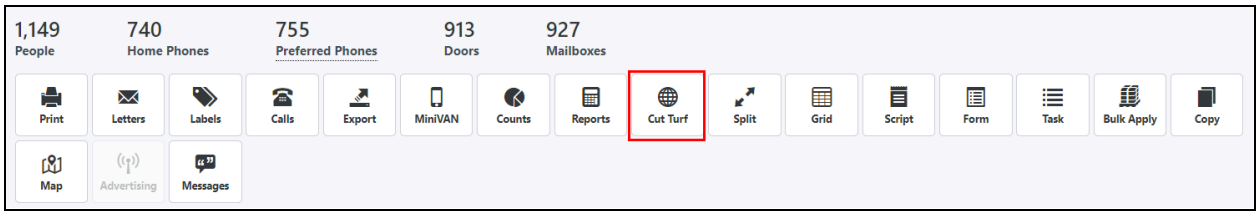
Once the integration is requested, find your tool's **Integrations** tab (or similar) and enter any info requested for a VAN integration.

In general requests should be connected to **My Voters** rather than **My Campaign**—if you want access to both you'll have to set up an API for both

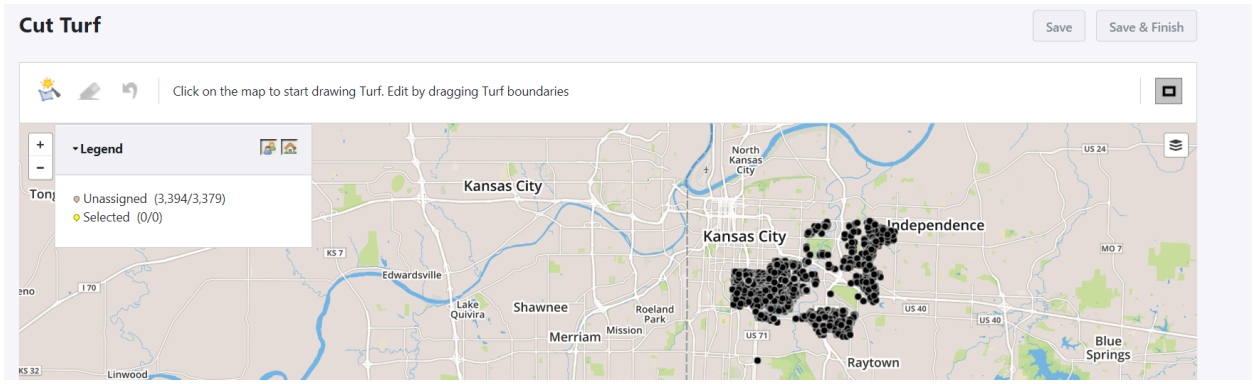
Canvassing & MiniVAN

Canvassing voters is one of the most effective methods of voter contact available to campaigns. VAN makes it easy to turn your lists into a canvassing turf! Here's how you do it:

- After you have prepared the list of voters you want to canvass (this must be under 5000 people), you will see the **Cut Turf** icon above the list. Click that icon.



- A map like this will pop up:

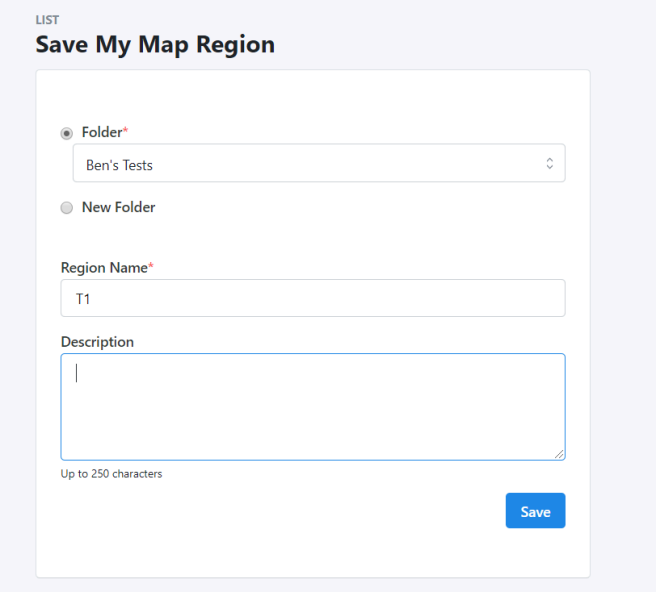


- To begin to cut turf, click anywhere on the map and a dot will appear. Click somewhere else and another dot with a line between the two dots will appear. You will want to create a polygon around a set of compact, walkable households like below. Pay attention to the layout of an area - time spent on a long walk or highway crossing between doors is time canvassers aren't spending talking to voters (and no fun in extreme heat or cold).



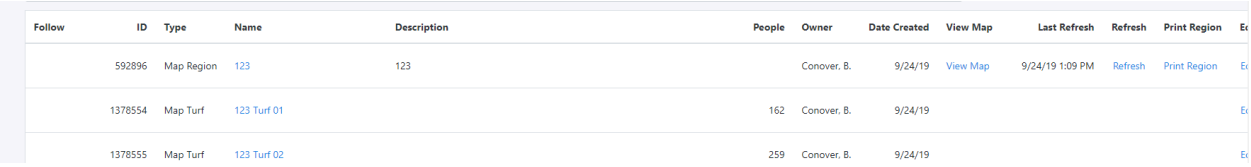
- The ideal turf size can vary depending on how dense a neighborhood is. In dense urban neighborhoods, a volunteer may cover 80 addresses in a 2-3 hour shift. In outlying parts of a city and in suburbs, 40-50 households would be typical. In more rural areas, 20-30 doors may be a solid result. Adjust turf size based on local conditions.

- You can cut up to 30 turfs from any list. Once you are done, click **Save & Finish**.
- You will see the following screen to save this set of turfs:

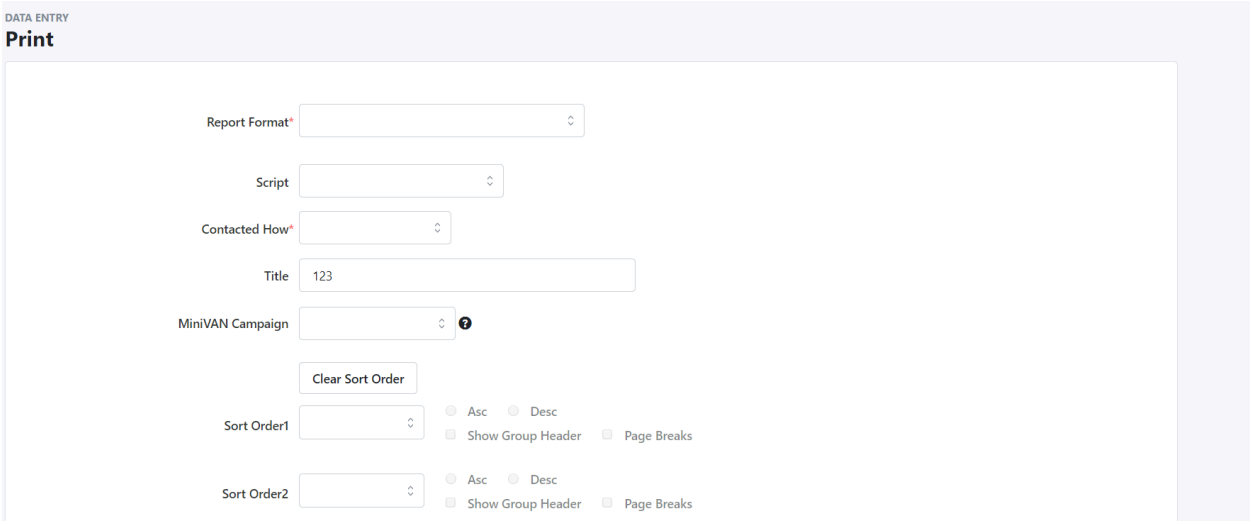


- This will save the turf you've created to **My Turfs**.

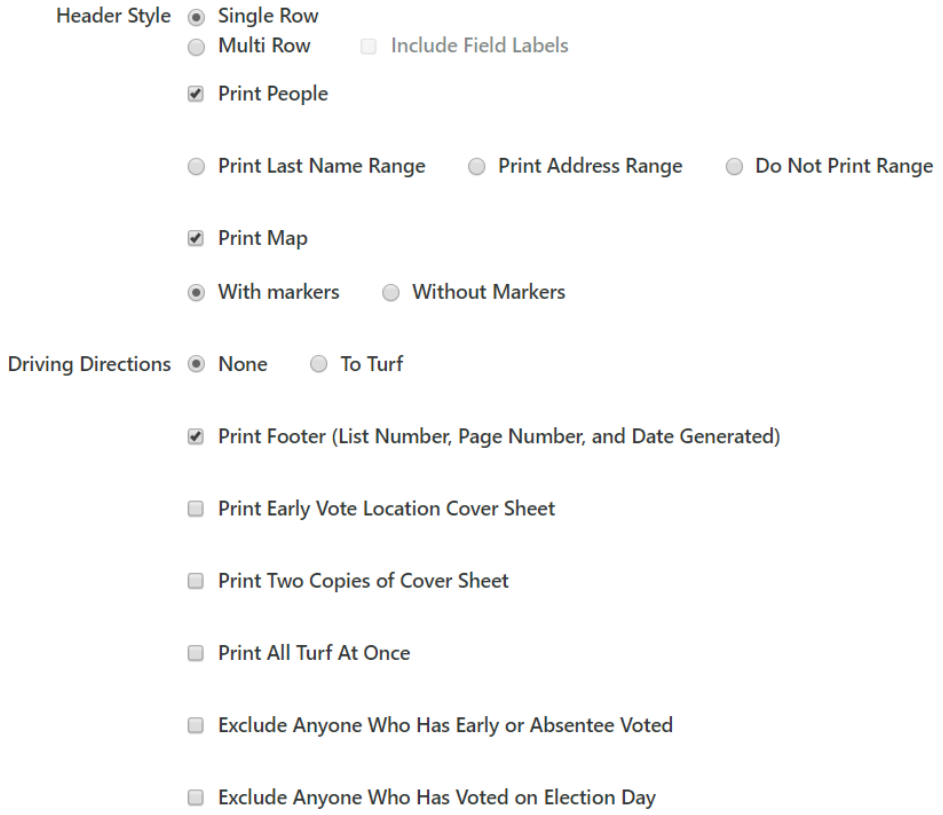
- From there, you can edit turfs, view the full map, and most importantly **Print Region**:



- This will take you to a screen where you can set up how you want a canvassing list to be formatted:



- You can pick a format, attach a script, select the proper contact type (use **walk** when canvassing), and decide how you want information displayed.



- You can now hit **Next** to send the list to **My PDF Files** for printing. You can also attach the turf to a campaign in MiniVAN (VAN's mobile canvassing tool).

The MDP strongly encourages you to use MiniVAN for your canvassing activity, and not paper lists. Paper lists mean data entry, which is slow and error-prone. This takes time away from voter contact and delays other work.

Here is how we generally recommend using MiniVAN on your campaign

MiniVAN

First thing is first: where does a User download MiniVAN?:

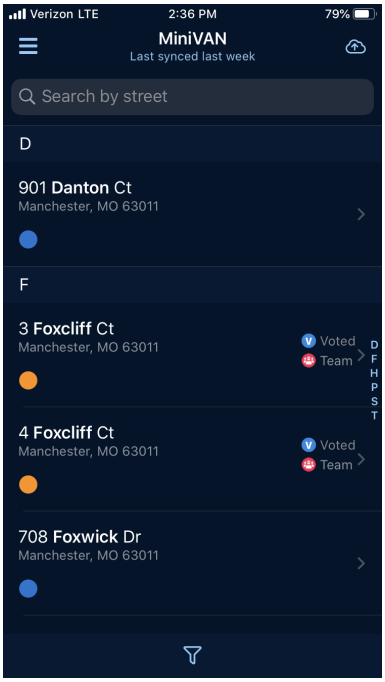
- **Google Play (Android devices)** - **https://play.google.com/store/apps/details?id=com.voteractivationnetwork.minivan&hl=en_US**
- **Apple Store (iPhones/iPads) - https://itunes.apple.com/us/app/minivan-touch/id352087547?mt=8**
- **Amazon Fire Tablets -** This is a little more involved since you can't easily go to the Google Play Store or the App Store like you can with Android and Apple OS - **https://apkpure.com/minivan/com.voteractivationnetwork.minivan**

You will need an ActionID to log-into MiniVAN. If you have a VAN account, use your VAN login credentials. If a volunteer doesn't have a VAN account, MiniVAN allows them to set up an ActionID using their email.

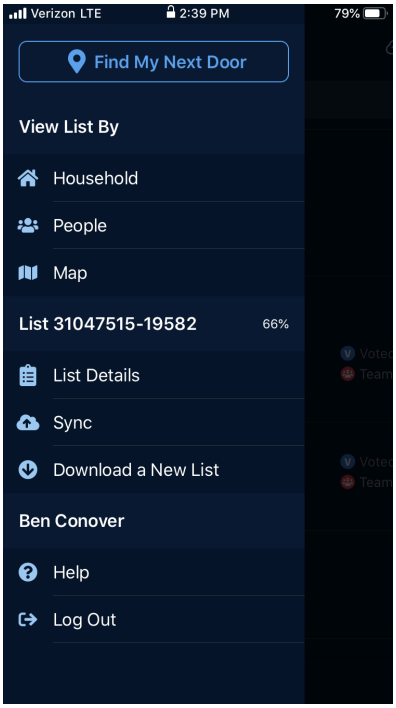
Above, in **Canvassing**, we detailed a process to generate PDFs of your turfs. The PDF file you've created will include **List Numbers**

List Number	Turf	People	Doors	Canvasser	Phone	Out	In	Attempts	Contacts	
31281867-22930	Turf 01	162	142							
31281868-37624	Turf 02	259	242							
31281869-45752	Turf 03	122	106							
31281870-45269	Turf 04	76	69							
31281871-28688	Turf 05	372	344							
31281872-25281	Turf 06	260	242							
31281873-58878	Turf 07	305	280							

Once a canvasser is logged into MiniVAN, they can click **Download a New List** and enter a list number. A screen like the one below will pop up:



Click on any address to find voter profile information. You can work with your field lead to decide how to tackle a list. Under the Menu (top left triple dash), there are other ways to view the doors, such as person by person or as a map.



You can also press **List Details** to review canvassing activities and status. The **Sync** button, at the top right of the first image (or below the **List Details** button), loads all canvassing data to **MiniVAN Commit**. Once data is loaded to MiniVAN commit, a campaign's field lead can review that data and sync it to VAN.

MiniVAN Commit

MiniVAN Commit gives campaign staff an opportunity to review data before it's synced to VAN's database. As canvassers sync data from MiniVAN, it's loaded to MiniVAN commit. Campaign staff should review and approve/reject data as soon as a canvass concludes. If possible, review this data with your canvassers so you can be certain they understood the process and recorded quality information.

Data stays in MiniVAN Commit for 21 days, at which point it is lost if not committed.

To access MiniVAN Commit, go to the left side of your VAN home page; type **MiniVAN Commit** in the search bar; and click the first result.

For best practices on quality review of canvass data, please check out this training document. Common reasons to reject data include unreasonable contact rates, unreasonable time between doors, illogical address order for canvassing, inappropriate householding, and flipping of survey responses.

If you are interested in using **MiniVAN Campaigns** or **Distributed Canvasses**, please click on either to find more information.

My Campaign v. My Voters

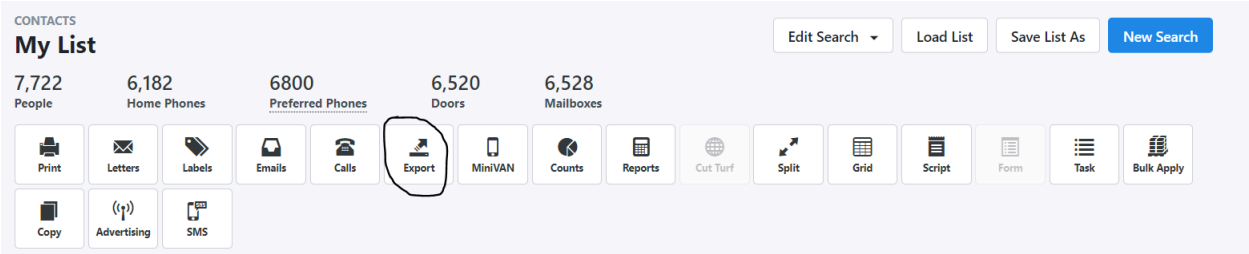
For a useful description of the difference between My Voters and My Campaign, please see page 5 of the NGP VANual -- which is a great resource for a great many things about the VAN.

For guidance on creating events in My Campaign, please see this lovely presentation from the Texas Democratic Party: **VAN: My Campaign Events**.

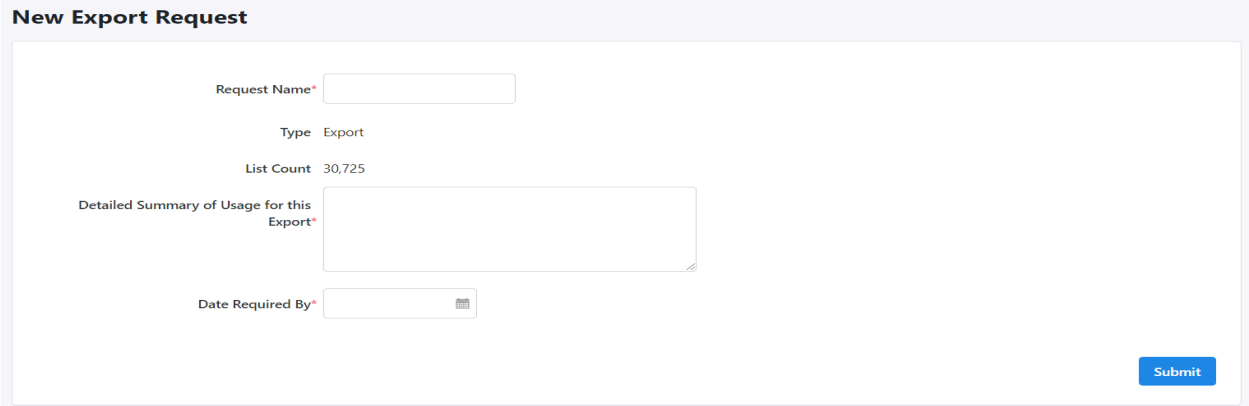
Exports

Before requesting an export, please review the MDP's export guidance. This covers use cases for exports and types of exports that are generally approved/rejected.

To request an export in VAN/Votebuilder, begin by creating the list you want to export in **Create a List**. You will see a screen like this; the **Export** icon is circled below:

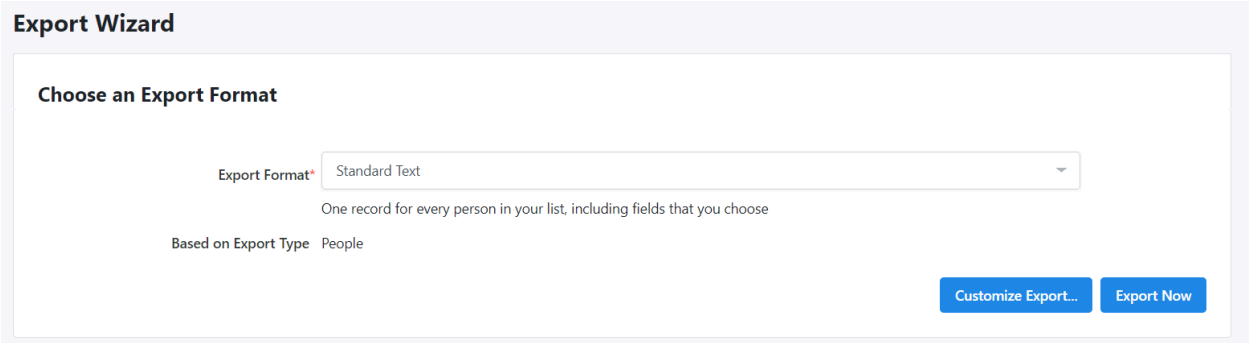


You will then encounter a screen like this:

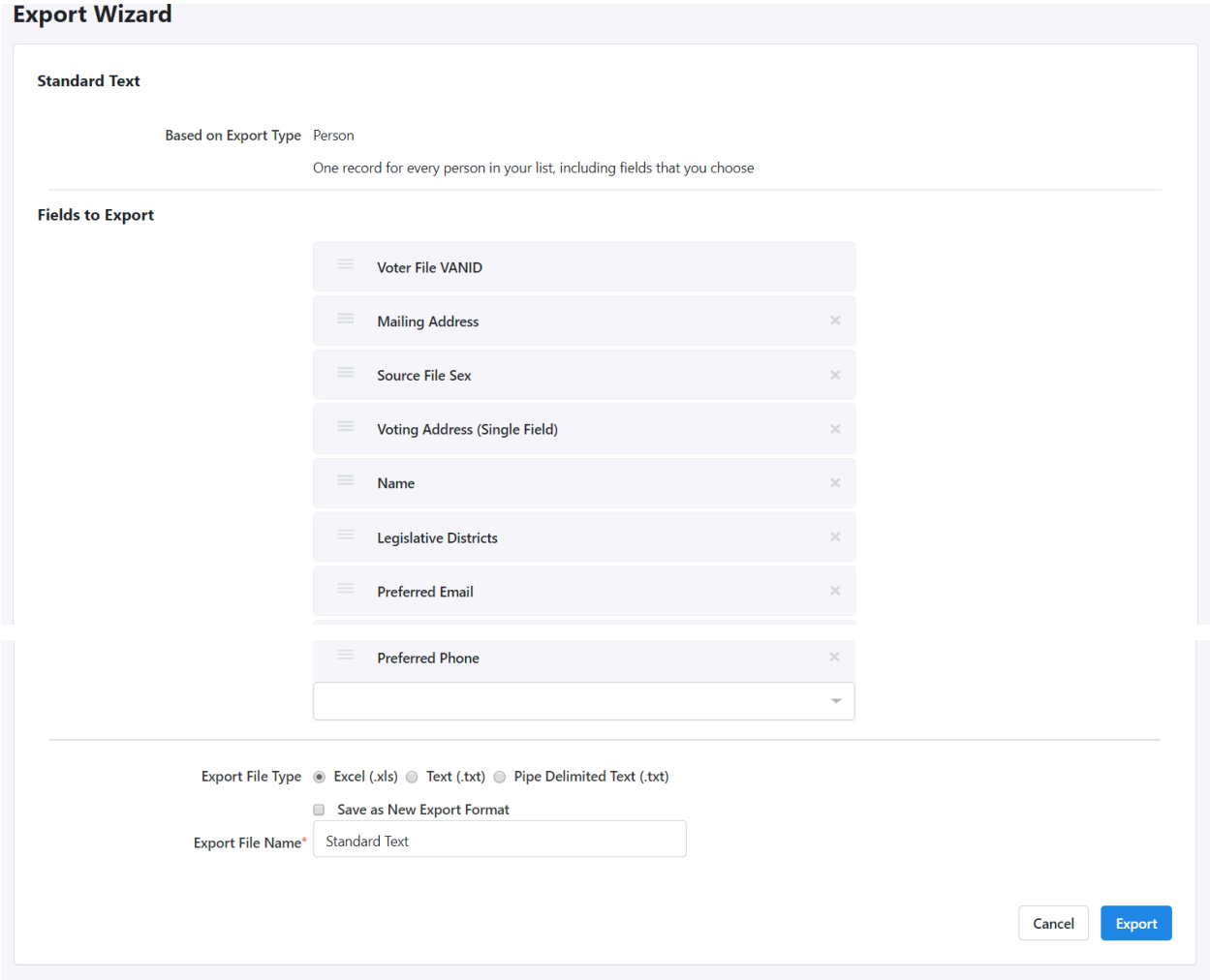


Identifying the purpose of your export in the "Detailed Summary of Usage for this Export" is important.

Once you hit submit, the MDP's VAN administrator will receive your request. If your request is approved, you will get an email notification and the file will be available in **My Export Files** on the Main Menu screen. Click on the file to open the **Export Wizard** (see screenshot below).



If you know what Export Format you need, you can select it from the dropdown menu. If you would like to choose the fields in the export, please use the **Standard Text** export format and click **Customize Export**. Here's what that looks like:



The blank dropdown box allows you to select any available fields you'd like in your export. Select your export type, save the export format if it is one you'll use again, and click Export.

Please note: you may run into certain fields not being .txt formatted. If the .txt issue occurs, please email vansupport@missouridems.org.

Your export will now be available to download in **My Export Files**. It will be downloaded as a ZIP folder; copy the file you need from this folder. Email vansupport@missouridems.org with any questions.

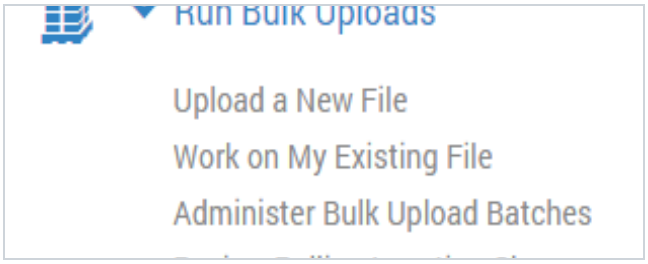
Please note: We may have questions about your export request. You will get a notification on **My Requests**, which is on the top left of the Main Menu. Please click there and correspond with us. *We have been responding by email but this will be harder to maintain as request volume increases with the cycle picking up.*

For more information, see the MDP Export Policy.

Bulk Uploads

Bulk uploads allow you to apply contact results, survey responses, activist codes, and other data points to large numbers of voters at once. Acceptable data types include Excel files, .txt files, Google Sheets, and CSV (comma separated value) files.

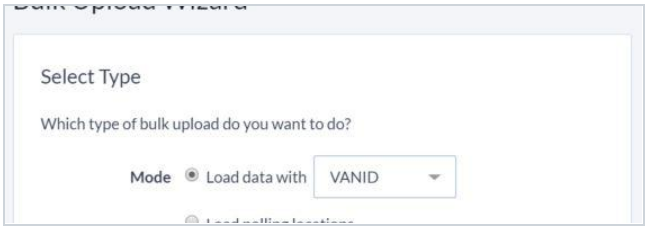
To start a bulk upload, find the **Load Data** tab on VAN's homepage, select **Run Bulk Upload**, and click on **Upload a New File**. You can also access the bulk upload tool by clicking **Bulk Upload Wizard** in VAN's sidebar menu.



Finally, you can apply data to voters in an existing VAN list by going to **My List** and clicking on the **Bulk Apply** icon.

When you run bulk uploads, VAN requires a unique identifier to match your data to a voter. You have a choice of **VANID** (unique to each voter in Missouri; one per VAN record in Missouri), **State File ID** (unique to each voter in Missouri; one per registration record on the state voter file), or **NGP ID** (unique to each supporter; a person can have one NGP ID for each campaign that has them as a donor/email subscriber). VAN will match the data on your file to the VAN record with that VANID, state file ID, and/or NGP ID; this works the same way as a VLOOKUP function in Excel.

Choose which type of bulk upload you would like to run. Note that the first column must be the ID type you've chosen (usually a VANID or State File ID). Whatever ID type you choose, that ID must be in the first column. If your file includes duplicate column headers or blank column headers, this will produce an error.

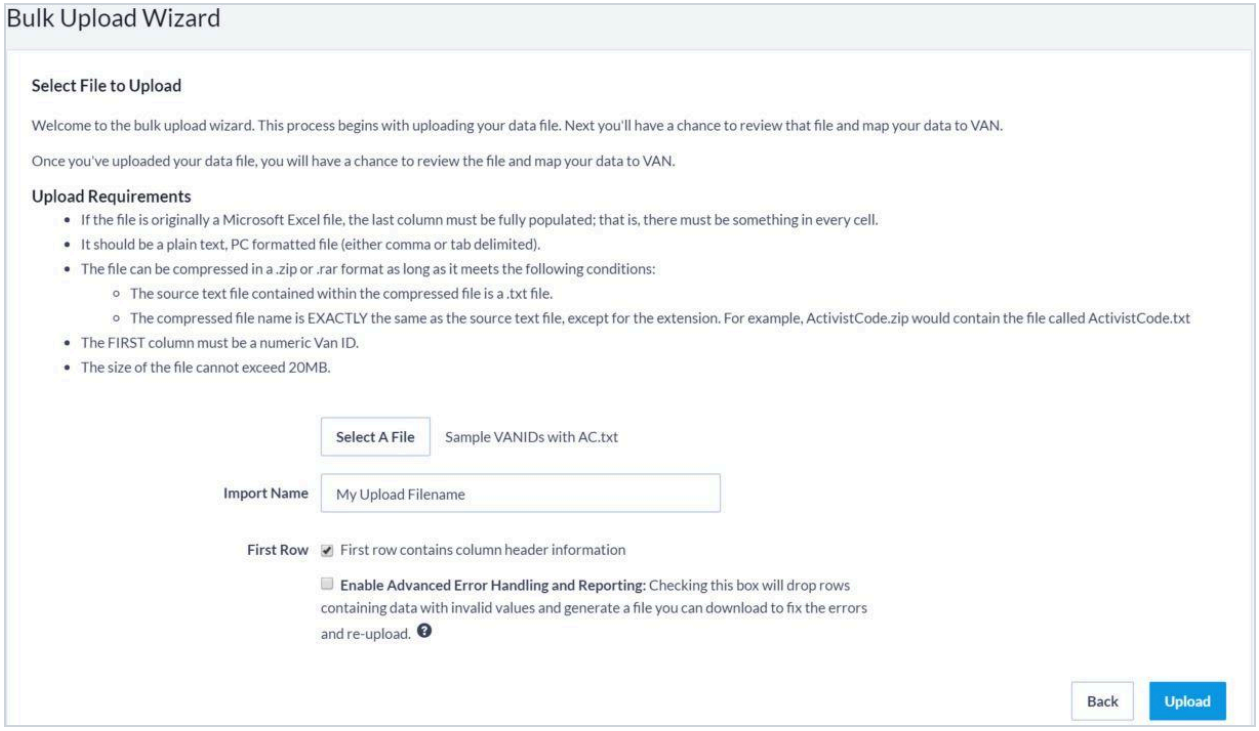


The next page lists all of the conditions necessary for a successful upload. Choose **Select A File**, and name the import for your own reference. If the file contains a header row naming each column, make sure the First Row checkbox is enabled.

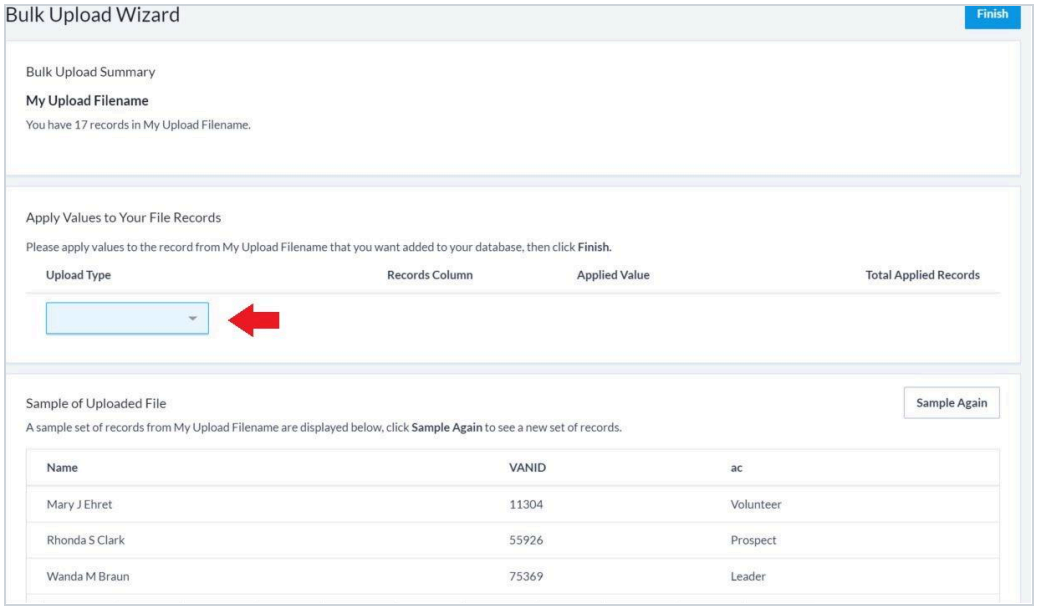
In volunteer or membership databases where users are allowed to create new records, you might see an option to Bulk Upload people with **Load new people directly**.

You can also choose to see an error report for your file by checking **Enable Advanced Error Handling and Reporting**.

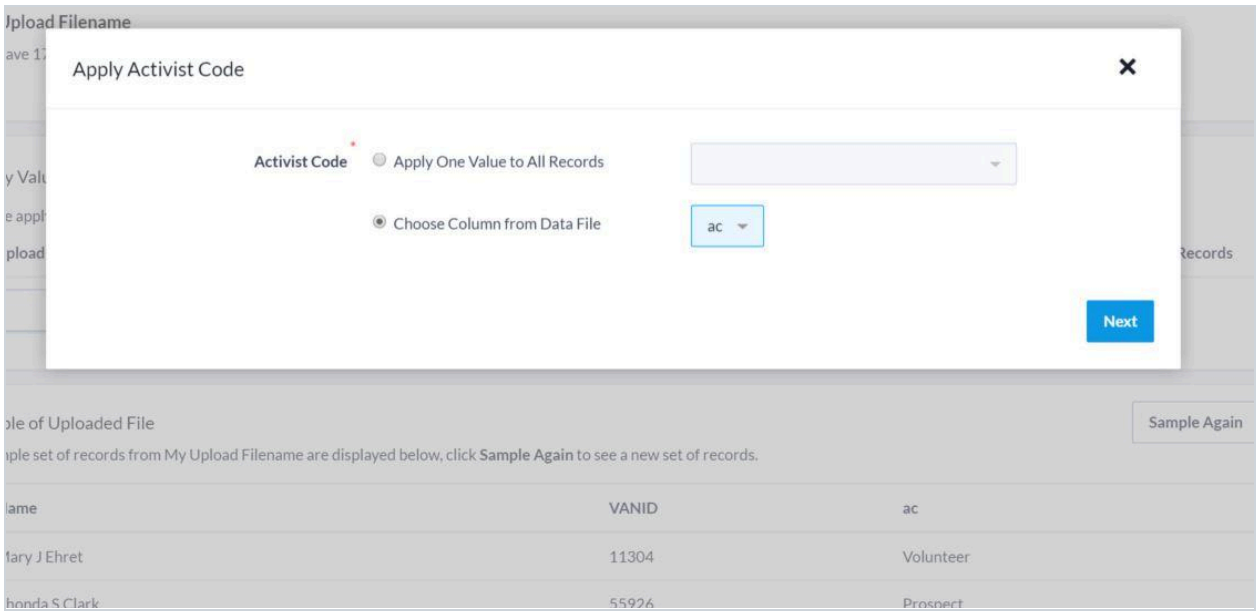
Then, click **Upload**.



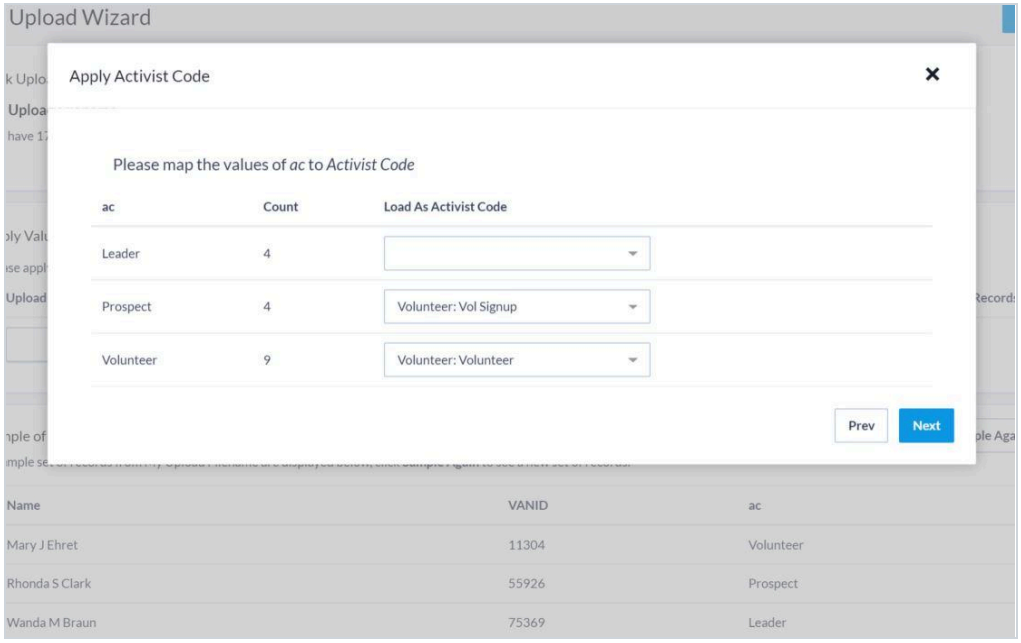
To map the fields you would like to include in your upload, first select the type of field you wish to map from the **Upload Type** dropdown menu.



Select the Column from the Data File you would like to map (in the example the column name is 'ac,' short for "activist code"). Note that you may be asked to fill out additional information such as canvasser and date depending on which field you are updating. You don't need to fill this information out unless the field is mandatory; feel free to leave it blank if you don't know the answer. When finished, click **Next**.



Map the values in the column to the value you would like to appear on the voters' files. In the example below, the value 'Prospect' from the Data File is matched with the activist code for Vol Signup. The value 'Leader' is not yet matched to an Activist Code. When finished mapping values click **Next**.

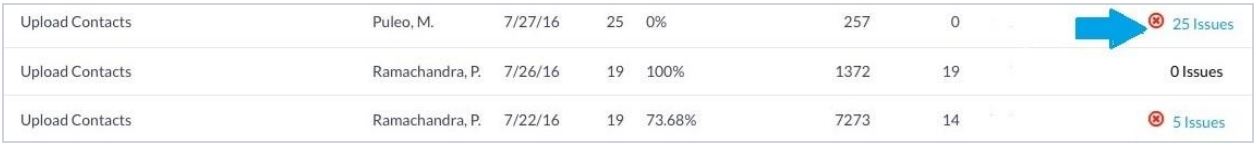


Repeat the process for all columns you'd like to apply to voter records, then click **Finish** at the top of the screen.

Bulk Upload Error Handling

Choosing to **Enable Advanced Error Handling and Reporting** means the bulk upload tool will not upload rows containing data with invalid values, and will generate a file of records with errors that users can download, review, and re-upload with any changes needed to resolve these errors. Please note this functionality exists for some fields in My Voters and My Campaign, but not all.

A new column called **Issues** will appear in the **Active Bulk Batches** list on the **Administer Bulk Upload Batches** page. Users can navigate to this page to see the status of their uploads and the number of errors detected in a file.



To view the error report, users can click on the **Issues** link in the column. This will allow users to download a report of issues VAN detected.

The download will contain two files:

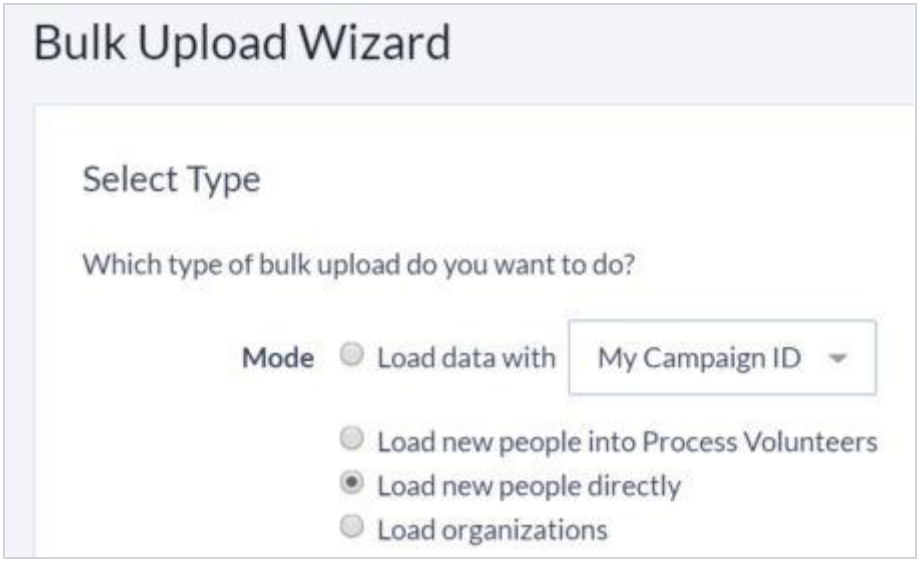
1. A line by line accounting of any rows containing invalid values
2. An Excel file of the affected rows, which users can download, fix, and re-upload as a new Bulk Upload batch.

Please note that any upload containing at least one error code will not be considered 100% processed even if all valid rows (that is, rows not containing an error) have fully uploaded and processed. This is true even if a user consults the error log for such an upload, corrects the records with errors, and performs a subsequent upload.

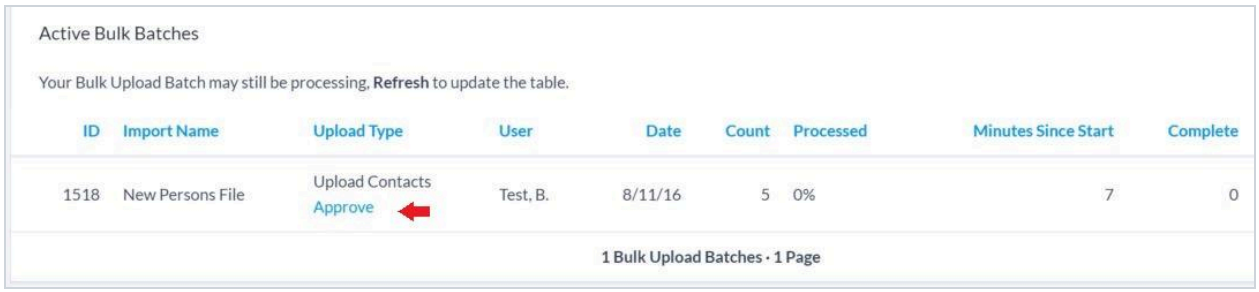
In **My Voters**, error handling will apply to Bulk Uploads for **Apply Phone Number and Email**. In My Campaign, error handling is available for **New Person** uploads, as well as uploads containing **Address**, **Phone Number**, and **Email** fields. For New Person Bulk Uploads in My Campaign, any fields associated with a new person record that fails will also fail. For example, a new person record with invalid name or address formatting will not be created, so an activist code mapped to this record in the same upload batch will also fail.

Additional Bulk Upload Options

Load New People Directly allows users to add new records to My Campaign and does not require an ID in the first column to match to an existing record. However, you should include **My Campaign IDs** in the first column if available. This allows VAN to match a higher share of existing records and create fewer duplicate records.



Before creating new records, the Bulk Upload tool attempts to match your file to existing records. Go to **Administer Bulk Upload Batches** and approve the upload so it can finish processing.



Load new people into Process Volunteers also allows you to add new records, but requires users to manually match each record before it's processed. The **process volunteers** queue is available from the main menu. This queue allows users to add, skip or reject records in the upload file one at a time. This can be more precise, but is time consuming for larger lists.

Large Bulk Uploads

The VAN Support Team is alerted to bulk uploads that are very large, and might impact overall system resources if allowed to proceed. When this happens, the user will also be notified and VAN support may have the MDP data team follow up with suggestions for an alternative workflow.

Cancelling a Bulk Upload

If a bulk upload has not processed, you can cancel it by going to **Administer Bulk Upload Batches** and clicking the link to cancel your upload. If that link is not available, then you have missed your opportunity.

In the event an upload was applied incorrectly, submit a support request ticket to the MDP data team to see about undoing it. Note that this requires custom data work on the backend and could incur additional costs; the MDP data team will be able to confirm this for your case. Please be careful using the bulk upload tool to apply large amounts of data.

Missouri Democratic Party Targets

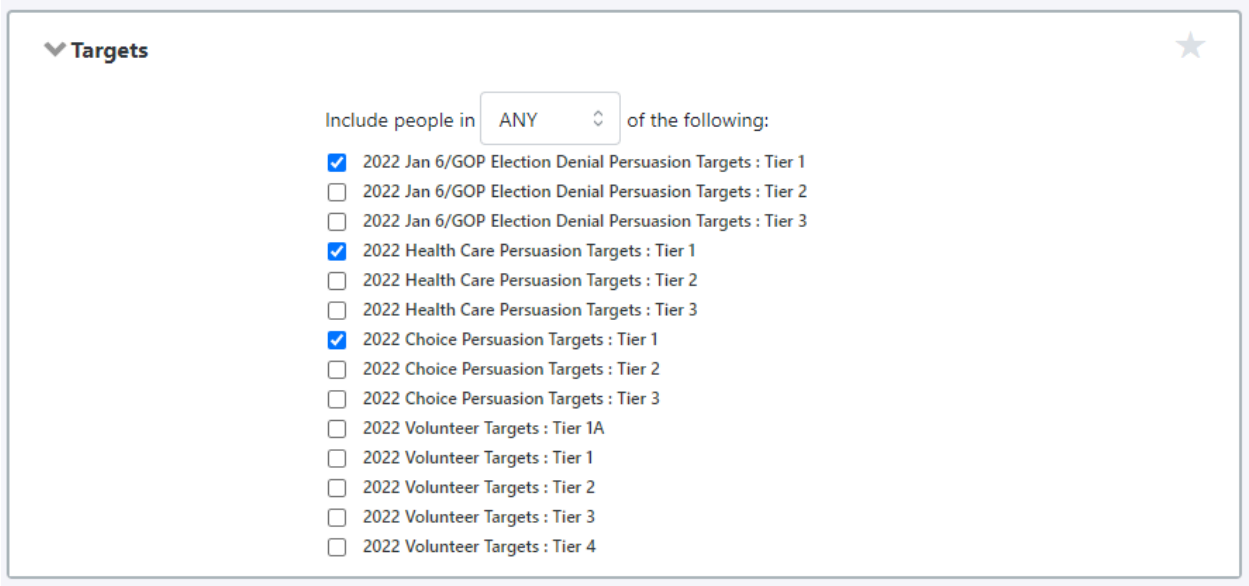
The Missouri Democratic Party (MDP) Data Team has created a set of VAN **Targets** to help campaigns build lists for voter contact. The purpose of targets is to combine a wide range of information available to the MDP (statistical models, past survey questions/activist codes, contact by campaigns up and down the ticket) in a simple format that allows campaigns to prioritize outreach.

Campaigns can incorporate these targets into lists and searches as follows:

1. Go to **Create A New List**
2. Scroll down to **Targets**
3. Check the appropriate target(s) for a list

Currently, four sets of targets are available to partisan campaigns.

- **Volunteer targets** include several tiers of people with a higher-than-average chance of volunteering for Democratic campaigns and causes.
- **Choice persuasion targets** include several tiers of people likely to respond well to messaging on abortion/Roe v. Wade.
- **Health care persuasion targets** include several tiers of people likely to respond well to messaging around health care costs.
- **Jan 6th/GOP Election Denial persuasion targets** include several tiers of people likely to respond well to messaging about GOP extremism and refusal to accept free and fair elections.



In general, targets begin with **Tier 1** (most promising/highest priority for campaigns) and run through **Tier 3 or 4** (lower priority). Voters who are not assigned a target tier are the lowest-priority of all; for example, voters in volunteer recruitment tier 4 would be more likely to volunteer than voters who aren't part of any tier of targets.

Note that each set of targets is mutually exclusive; if a person meets the criteria for inclusion in tier 2 *and* tier 3 of a set of targets, they'll appear in the highest tier whose requirements they satisfy.

New targets will be added to this document as they're released.

Volunteer Targets

Tier 1A

This tier includes volunteers credited with at least one contact attempt through 12/31/2020. This is the smallest tier of volunteer prospects, but also the most active and involved on average.

Tier 1

This tier includes voters who answered "yes" to a volunteer survey question between 1/1/2015 and 12/31/2020. It represents a good starting point for campaigns building out their volunteer lists. The number of targets available depends on past campaign activity in a district, so some areas will have more targets than others. The MDP is developing additional tiers to support outreach in areas with few recent campaigns and limited volunteer data.

Tier 2

This tier includes voters with a record of interest/attendance for Democratic campaign or party events through 12/31/2020. Because event RSVPs/attendance represent a level of active involvement on campaigns, this is a good set of voters to contact about volunteer opportunities (though lower-priority than voters who've expressed a specific and recent interest in volunteering).

Tier 3

This tier includes voters who answered "yes" to a volunteer survey question between 1/1/2010 and 12/31/2014, or "maybe/later" between 1/1/2010 and

12/31/2020." These targets are less likely to volunteer than people who've shown stronger or more recent volunteer interest, but provide added options for outreach in areas with fewer active volunteers or for campaigns with time and resources for additional outreach.

Tier 4

This tier includes voters who have no specific record of volunteer interest based on MDP data, but fall in the 5% of the population most likely to volunteer for Dems based on scores and consumer data. These targets are a good option to expand a campaign or organization's base of volunteers, especially in areas where the number of Dems involved in prior campaigns is limited.

Persuasion Targets

Our current persuasion targets span three issues:

- **Choice persuasion targets** include several tiers of people likely to respond well to messaging on abortion/Roe v. Wade.
- **Health care persuasion targets** include several tiers of people likely to respond well to messaging around health care costs.
- **Jan 6th/GOP Election Denial persuasion targets** include several tiers of people likely to respond well to messaging about GOP extremism and refusal to accept free and fair elections.

For each issue, voters can be assigned to one of three tiers

- **Tier 1** - highest priority to contact; largest gain in Dem votes from outreach
- **Tier 2** - next-highest priority; moderate gain in Dem votes from outreach
- **Tier 3** - broader set of persuadable voters; some gain in Dem votes from outreach

These targets combine three data points:

- The likelihood that someone will be persuaded to support Democrats over Republicans by messaging on an issue
- The likelihood that someone will vote
- Candidate support data pooled across all Democratic campaigns

The result is a single number that can be used to prioritize voters for outreach on a particular issue. Voters are assigned to a target tier based on this number. It reflects the increase in Democratic votes expected from a campaign contacting voters about an issue.

Voters in the highest target tiers are usually:

- **Likely to vote** (so any change in their support for Dems is likely to translate into votes); and/or
- **Likely to be persuaded** (so Dems gain votes on average from contacting voters like them, even if some turn out and others do not)

Voters who do not fall in any target tier tend to be:

- **Unlikely to vote** (so any change in their support for Dems/Republicans is unlikely to translate into votes)
- **Extremely supportive of Democrats** (so Dems have little room to gain votes from further persuasion outreach)
- **Extremely partisan Republicans** (so their openness to switching their votes is low regardless of agreement with Dems on an issue)
- **Sympathetic to the GOP view on an issue** (so Dem messaging backfires)

Voters who are not assigned to any tier tend to have low openness to persuasion or high odds of backlash. In other words, outreach to these voters on a particular issue is unlikely to boost Democratic vote share significantly and may backfire. A voter may have low openness to persuasion because they're already extremely likely to support Democrats (meaning there's not much room to boost Democratic vote share with voters like them) or because they react negatively to outreach on an issue.

Cutoffs for each target tier are consistent across issues, so some issues have more voters in tiers 1/2/3 than others. This allows campaigns to prioritize voter contact based on voter attitudes around multiple issues. For example, persuasion outreach to a voter in choice persuasion tier 1 will flip more votes on average than outreach to a voter in health care tier 2 or Jan 6th tier 3.

Our suggested usage: to prioritize outreach on an issue, start by selecting tier 1 of persuasion targets. Select tier 2 and/or tier 3 if needed to reach a number of voters/households that matches your budget (for mail/digital) or volunteer capacity (for field outreach).

Note that when discussing GOP extremism on abortion access and Jan 6th/opposition to fair elections, message testing found it was important to refer to "MAGA Republicans" and not simply "Republicans." This is important to avoid alienating persuadable voters who may consider themselves moderate Republicans.

- **Need Help?** File a Support Request through Votebuilder. For in-depth questions about Targets, please email vansupport@missouridems.org.

MISSOURI DEMOCRATS

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We will continue to revise and update this VANual through the 2024 cycle. We welcome questions, feedback, and suggestions for new sections/added detail for existing sections. Please send any suggestions to Data Manager Andy Hatem by email to andy@missouridems.org or by text to 573-818-2429.