

USING VAN FOR GOTV VOLUNTEER MANAGEMENT



Tracking your volunteers in MyCampaign

MYCAMPAIGN EVENTS

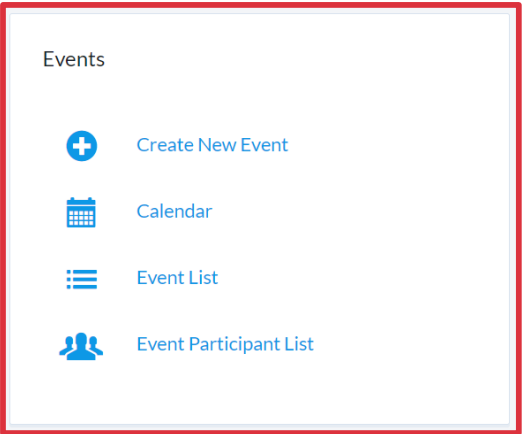
In order to get the most out of the Arena GOTV Tools—the GOTV Shift Recruitment Report and the GOTV Shift/Package Report—we recommend using MyCampaign calendar in VAN. This tool allows you to track GOTV volunteers using standardized events, roles, and shift times.

NAVIGATING TO EVENTS

Events are accessible through the main page of **MyCampaign**, on the right side.

You have the choice of:

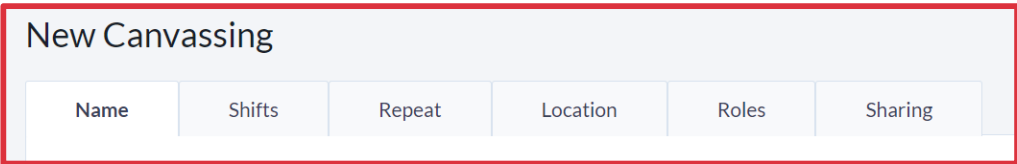
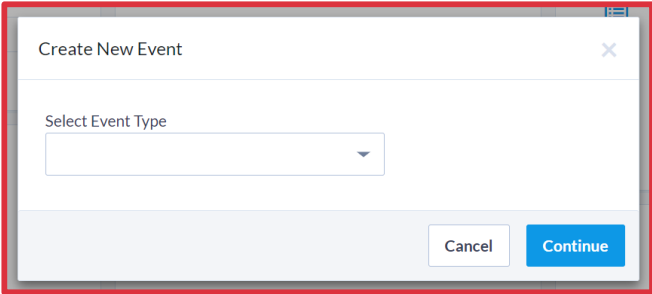
- **Creating a new event**
- **Viewing events as a list or on a calendar**
- **Looking at a list of event participants**



CREATING GOTV EVENTS

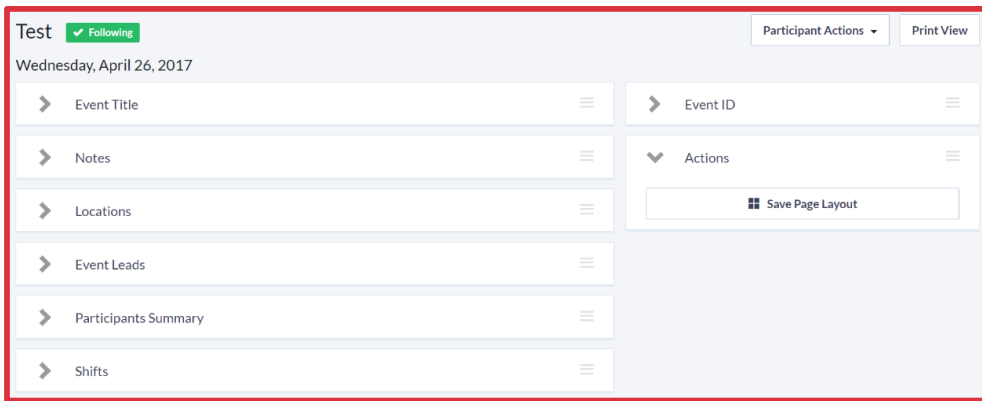
We recommend setting up recurring events by region so that there are standardized GOTV events for volunteers to be scheduled into.

To do this, use the event setup wizard to move from tab to tab selecting settings for your event. Click **Next** to move to the next tab, and **Finish** only when you're done.



- **GOTV EVENT NAME:** before naming events, decide on a naming convention and stick to it! This will make looking at the calendar much easier and ensure easy tracking of GOTV shifts before and during GOTV. Some sample naming conventions:
 - For GOTV events:
 - RegionName_OrganizerName_StagingLocation
 - For Early Vote GOTV
 - EV RegionName_OrganizerName_StagingLocation
 - For Dry Run GOTV Events
 - DR_RegionName_OrganizerName_StagingLocation
- **SHIFTS:** if you want to divide your event up into shifts, follow this standard schedule:
 - **GOTV Shifts:**
 - Shift One: 9:00 am – 1:00 pm
 - Shift Two: 12:00 pm – 4:00 pm
 - Shift Three: 3:00 pm – 7:00 pm
 - Shift Four: 5:00 pm – 8:00 pm
 - **EDAY GOTV Shifts:**
 - Shift One: 8:00 am – 10:00 am
 - Shift Two: 11:00 am – 2:00 pm
 - Shift Three: 2:00 pm – 6:00 pm
 - Shift Four: 5:00pm – Polls Close
- **LOCATION:** select a location for your event. This should be a staging location where you will launch your volunteer efforts. If the location doesn't exist in the drop-down, create a new Location record
- **ROLES:** Select the roles you will need to recruit for your event
 - Host (Staging Location Director)
 - Phone banker,
 - Dialer phone banker
 - Canvasser
 - Texting volunteer
 - Data Entry
- **SHARING** Leave the default setting here

Finishing your event will navigate to the main event page where you can see all the setting you just created for your event. Click on the carrots to dive into the categories, and make any edits.



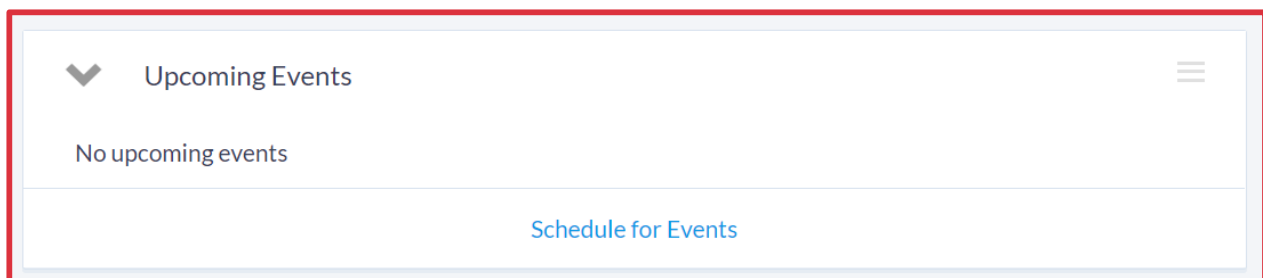
Participant Summary is where you'll find high-level counts on how many people you have invited/scheduled/confirmed etc. to that event. To see the personal details of these participants, click on **View All Participants**, and you will be navigated to an **Event Participant List** for the specific event.

Participants Summary								
	Invited	Left Msg	Scheduled	Tentative	Declined	Confirmed	Conf Twice	C
In Person - Presenter Host Trainer	0	0	0	0	0	0	0	
Phone - Phone Bank Shift	0	0	0	0	0	0	0	

[View All Participants](#) [Edit Event Roles](#)

SCHEDULE GOTV EVENT PARTICIPANTS

To schedule someone for an event, locate that person's profile, generally via Quick Look Up, and scroll down to **Upcoming Events**. Expand the category and click on **Schedule for Events**.



- You'll be given the option to select an event, shift, and role for that person.
- Select the status that most accurately reflects the ask you've made and the response you received.
- Then don't forget to save!

VOLUNTEER DATA FOR ARENA REPORTS

In order to gain valuable insights into the success of your GOTV operation, we recommend generating reports based off of scheduled volunteer data. The following instructions will allow you to export your volunteer data from VAN's MyCampaign in a format that can be easily added to the Arena [GOTV Shift Recruitment Report](#) and [GOTV Shift & Packet Report](#).

EXPORTING YOUR GOTV VOLUNTEER DATA

Use the Report Manager from the main menu to run an "Event Participant Report" that can be exported and then pasted into the Shift Recruitment Report.

Edit filters to select your dates for GOTV:

**11/3/2018
to 11/6/2018**

Event Participant Report
View event signups created in the last 30 days.

Applied Filters: [Edit Filters](#)
Contact Records: All Contacts | Signup Date: 11/3/18 - 11/6/18 X

Report Summary

Event Shift Start	Event Shift End	Number of Events	Number of Signups	Hours Completed	Number of Individuals
11/5/18 11:45 AM	11/5/18 8:00 PM	16	175	8	156

Group By: [Dropdown] | [Edit Columns](#)

VANID	Location Name	Event Name	Status	Role	Event Type	Event Date
103715054			Sched-Web	Canvasser	Canvass	
103677101			Sched-Web	Canvasser	Canvass	
103587062			Sched-Web	Canvasser	Canvass	
103553267	STAGING LOCATIONS NAME APPEAR HERE	GOTV EVENT NAME APPEAR HERE	Sched-Web	Phonebanker	Phone Banks	EVENT DATES APPEAR HERE
103677569			Sched-Web	Canvasser	Canvass	
103544006			Sched-Web	Canvasser	Canvass	
103544006			Sched-Web	Canvasser	Canvass	

Select > **Edit Columns** and select the following data fields for the report: **VAN ID, LOCATION NAME, EVENT NAME, STATUS, ROLE, EVENT TYPE, EVENT NAME.**

In the top right corner select > **Report Actions** then select > **Save As** to name your report and schedule when the report will run.

The next menu will allow you to select:

- User Recipients
- Email Subject
- Email Message

- Scheduled Details
- Frequency: Daily
- Start Date: Today's Data
- End Date: 11/6/2018

Save Event Participant Report Template As

All parameters, table columns, and group by selections will be maintained.

Report Name*
GOTV SHIFT REC EXPORT

Description
Make sure that your report description is clear and concise.

Sharing
 On

Editing
 On

Cancel Save & Schedule Save

Paste the daily CSV export into the VAN DATA tab on the [Shift Recruitment Report](#) or the [Shift & Packet Report](#), starting with cell A3.

Once this data is updated in the VAN DATA tab, the GOTV Report tab will update with new shift numbers and percent to goal for each staging location.