

Customizing Emails and Texts with Voter Specific Slate Cards

Overview

Adding customized data to an email or text message makes the message more relevant to the recipient and increases its overall effectiveness. Slate cards, in particular, lose effectiveness when crowded with information on races or amendments that are not relevant to a voter. The VAT Slate Card Generator makes it easy to identify races/amendments specific to individual voters, but incorporating that information into content delivered to voters requires additional steps.

The process required to accomplish this involves 1) updating VAN with information identifying which slate card a voter should receive, 2) including that information in the VAN export file, and 3) translating (mapping) that data to a bit.ly address that links to a specific slate card. (Note: The creation of slate cards as digital documents, saving the images in a web accessible location, and the generation of bit.ly addresses are not covered in this document.)

Updating VAN with Slate Card Identifiers

The Slate Card Generator automatically produces two data files that can be used to update VAN - one for registered democrats and another for left leaning NPAs. (Note: Left Leaning NPAs are determined by using VAN's Tier 1 Target plus applying a Dem Support Score of greater than 20. This has been shown to generally produce a 2:1 ratio of left-leaning to right leaning statewide.)

These files contain data columns suitable for updating either a VAN Survey question (Slate Card) or the VAN notes field (Notes). The choice of which technique is up to the county. In general, the use of the notes field is quicker and easier. The use of a Survey Question requires additional setup but provides better granularity in searches and retains its validity over time.

Some pros and cons associated with the two techniques.

Notes Field:

Pros	Cons
<ul style="list-style-type: none">• No need to create a new definition in VAN• Allows for larger uploads	<ul style="list-style-type: none">• Export contains search info in addition to slate card reference. Requires an additional step to match slate card to bitly.• Export may contain unrelated notes• Notes added after update will supersede slate card identifier

Survey Question/Answer”

Pros	Cons
<ul style="list-style-type: none">• A specific question can be selected for export.• Provides better history.• Exports slate card identifier without extra text• Can search for multiple slate cards in single step	<ul style="list-style-type: none">• Need to create Survey Question and include all slate card identifiers as legitimate ‘answers’• Need to ‘map’ data field to survey answers• Limited number of rows accepted in a single upload.

Procedure for updating Notes field

- Select “Run Bulk Uploads/Upload a New File”
- Change Mode to State File ID; Click Next
- Using the file-picker, select the VAN Upload file generated by VAT: Click Upload.
- In the Mapping Template block, select “Apply Notes”
- On the Apply Notes form, click on “Choose Column from Data File”;
- On the drop-down selector, choose the “Notes” column; click Next
- Click on Finish; when prompted click Finish again.

Procedure for updating Survey question

- Select “Run Bulk Uploads/Upload a New File”

- Change Mode to State File ID; Click Next
- Using the file-picker, select the VAN Upload file generated by VAT: Click Upload.
- In the Mapping Template block, select “Apply Survey Response”
- On the Survey Response form:
 - For the Survey Question option, select your Survey Question from the list
 - For the Survey Response option, activate the “Choose Column from Data File” option and select “Slate Card” from the drop-down list.
 - For the Contacted How option, accept Apply One Value to All Records: choose a reasonable response.
 - For the Contacted When option, accept Apply One Value to All Records: choose today’s date
 - For the Canvasser option, accept Apply One Value to All Records: choose an appropriate person
 - Click Next
- On the Apply Survey Response form, for each value under ‘slate card’, choose the correct value for ‘Load as Survey Response’; click Next
- Click on Finish; when prompted click Finish again.

At this point, each voter in VAN will be updated with the slate card that is specific to them. When exporting lists from VAN for canvassing (text, email, etc), be sure to include the appropriate VAN field (either your survey question or the generic notes field) in your Export Format.

Mapping the slate card identifier to a bit.ly address

This step assumes that slate cards have been designed, saved in a web-accessible location, and bit.ly addresses created for each slate card. In this step, we will create an additional column in the VAN Export file and populate that column with the bit.ly address associated with the slate card identifier for the voter.

The general approach will be to use a standard spreadsheet tool to translate the slate card identifier to the appropriate bit.ly reference. The first step is to create the mapping required. Start by loading the VAN export data into a spreadsheet and create a new tab for the mapping data. In the new tab, column 1, enter a slate card identifier. In column 2, enter the bit.ly address of the slate card image. Complete the mapping for all slate card identifiers.

Example of a mapping spreadsheet:

Slate Card	Bit.ly Address
SC-01	Address 01
SC-02	Address 02
SC-03	Address 03
SC-04	Address 04

SC-05	Address 05
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Next, add a column to the voter export spreadsheet to hold the bit.ly address for each voter. In that column we will define a function to translate the slate card identifier to a bit.ly address. The function to add is as follows:

LOOKUP (<search-for> , <search-where>, <result-value>)

Where:

<search-for> is the column in the main tab that contains the Slate Card Identifier.

<search-where> is the first column in the mapping spreadsheet

<result-value> is the second column in the mapping spreadsheet

Copy and paste (or use the fill down feature) to insert the above formula into each cell in the column. Each cell will be populated with the bit.ly address that corresponds to the slate card address in the same row.

This completes the translation. Using the spreadsheet export function, export the data from the main tab of voter data to the file format needed by your email or texting service. Be sure to modify your email (or text) message to embed the data from the new column.

Addendum for using the Notes field

The recommended column to use when updating the Notes field in VAN is the “Notes” column in the VAT generated data files. This column contains the current election information in addition to the slate card identifier (ex: 2022GE SlateCard:SC-03). The additional information is included to allow searching the notes for specific elections. When generating the mapping data, you may include this entire string to match what is in the VAN export file, or you can shorten it to just the slate card identifier as described above. In that case, you will need to ‘parse’ the contents to extract just the slate card identification info for matching. There are many functions which can be used, but I believe the simplest is the RIGHT function. That function returns a number of characters from the right side of a string. Its format is as follows:

RIGHT (<source-string>, <string-length>)

This function can be used to create an intermediate column containing only the slate card identifier or can be coded ‘inline’ to extract just the identifier within the LOOKUP function. For our use the format would be:

RIGHT (<source-string>, 5)