

2. Overviews

2.1 Questions & Tags

2.2 Scripts and Forms

2.3 Canvass Cards

2.4 Canvass Analysis & Target Pools

What

This quick sheet will show you all you need to know about Tags, Questions and Master Questions

Why

Questions and Tags store the key information about your voters, so you need to know the differences between them.

Where

You will find Questions and Tags whenever you look in an individual voters record, when you create a list and also in scripts and forms.

Questions and Tags

There are several key differences between Questions and Tags.

The most obvious one, is that questions have answers and tags don't.

So Questions are used to store things like canvas data, where people can give different answers. Tags are used for things like the voter puts up a window poster, where they either apply or do not.

National v local

Tags are set nationally, whereas you can create your own local questions.

You can use local questions to ask about local elections and by-elections and local issues.

Users from Senior Activist upwards can create Questions.

Associated data

Each tag allocation or question answer has additional information stored with it. These are:

- Canvasser
- Date canvassed
- User who entered data
- Date data was entered
- Contact type (Doorstep, phone, etc)

Some of this associated data is stored automatically by Connect. Some of it, such as canvasser name and canvassed date, you need to enter yourself.

Master Questions

In Connect, there are a few Master Questions which pull together answers to other questions. The Master Question you will probably use the most is Master Party ID. This allows you to quickly and easily search by canvass response, as it will search all the different questions that ask about voting intention.

Keep on learning - these Quick Sheets will build on what you have learnt here:

3.1 - Creating a List

Use your knowledge of tags and questions to create a list of voters, based on their tags or question responses.

4.1 Printing Canvass Cards

Learn how to print Canvass Cards so you can get some more answers to questions into Connect.

**Watch training videos at Member.LibDems.org.uk/Skills
Get support on Facebook - search for Connect Users**

What

Scripts and forms make it easier to gather and enter multiple pieces of information from individual voters.

Why

To make the most of your canvassing and surveying, you should store as much of the gathered data in Connect as possible.

Where

Scripts are used on Canvas Cards and in the Virtual Phone Bank. They are then used to enter data in Minivan, Grid View, Script View and using a barcode scanner. Forms are used for entering data in the Form View.

Scripts

A Script is made up of questions, tags and other blocks of text. They make it easier for your volunteers to gather the exact data that you want for Connect.

You can use these scripts for doorstep canvassing and phone canvassing. Most commonly scripts are used for asking about voting intentions, but you can also use them for asking questions about local issues, recruiting supporters or anything else you can think of to ask your voters about.

Connect Constituency Managers can create and edit local scripts to make sure they include all the correct questions and information to your local campaigns.

When doorstep canvassing you can use a script in Minivan, or record answers on a paper Canvass Card. If you do use paper cards, you can enter your results using Grid View or a barcode scanner.

You can also use scripts to make phone calls using the Virtual Phone Bank. Using this tool means the data goes straight in to the database, with no need for further data entry.

Hello, my name is _____, and I'm calling on behalf of your

Party: For which party do you normally vote at the national level?

L = Def Lib Dem
I = Prob Lib Dem
C = Conservative
c = Soft Conservative
B = Labour
b = Soft Labour
G = Green Party
U = UKIP
N = BNP

Party: If you usually support Labour here, would you be worried if we beat the Conservatives?

Y = Yes
N = No
M = Maybe

[If they vote Lib Dem ask if they would like to display a poster...]

Poster Wanted: Will you display a poster...

Visibility: Poster Wanted

Above: A section of a script printed on a Canvass Card.

Below: A script in the Virtual Phone Bank

Hello is that _____?

I'm a volunteer for the local Liberal Democrats. We're conducting a very quick survey of local residents and I was just hoping to might have 2 minutes to answer a few quick questions, please?

Do you think that the Conservatives running Somerset County Council are doing a bad job?

Do you think that local MP David Laws is doing a good job?

Which party are you planning to vote for in the upcoming election?

My Voters

Forms

Forms are best used to compliment surveying activities.

When you produce a paper survey in PagePlus, your Connect Constituency Manager can create a Form to go with it.

The Form will include all the Questions and Tags from your survey in a similar layout. It won't look exactly the same, as any photos and additional text won't be included.

The similar layout is just to make it easier for you to make sure you enter the answers in the right place.

Whether you are knocking on doors or delivering your survey, using a form will make your data entry quicker.

| | | | |
|--|---|---|--|
| Home Phone <input type="text"/> | Mobile Phone <input type="text"/> | Transport | |
| Email <input type="text"/> | | Transport Use <input type="text"/> | |
| Date of Birth <input type="text"/> | Sex Male <input type="text"/> | Economy | |
| Our Area | | National debt <input type="text"/> | |
| Our Area <input type="text"/> | Victim of crime <input type="text"/> | At risk <input type="text"/> | Your Views |
| Top Three Issues | | Conservative speak up <input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1 | Labour speak up <input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1 |
| Jobs important? <input type="radio"/> Yes <input type="radio"/> No | Education important? <input type="radio"/> Yes <input type="radio"/> No | Lib Dem speak up <input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1 | |
| NHS important? <input type="radio"/> Yes <input type="radio"/> No | Taxes important? <input type="radio"/> Yes <input type="radio"/> No | Join the Team <input type="checkbox"/> Clerical <input type="checkbox"/> Deliver <input type="checkbox"/> Local Donor <input type="checkbox"/> Opted In <input type="checkbox"/> Will Display Poster | |
| Traffic/Parking Imp? <input type="radio"/> Yes <input type="radio"/> No | Public Transprt Imp? <input type="radio"/> Yes <input type="radio"/> No | | |
| Crime Important? <input type="radio"/> Yes <input type="radio"/> No | Housing important? <input type="radio"/> Yes <input type="radio"/> No | | |
| Environment imp? <input type="radio"/> Yes <input type="radio"/> No | Recycling Important? <input type="radio"/> Yes <input type="radio"/> No | | |
| Europe important <input type="radio"/> Yes <input type="radio"/> No | Immigration Impnt? <input type="radio"/> Yes <input type="radio"/> No | | |
| HEREFORD DEVELOPMENT <input type="text"/> | Our City <input type="radio"/> New Shops <input type="radio"/> Fill High Town <input type="radio"/> More out of town <input type="radio"/> No More <input type="radio"/> other | | |
| By Pass <input type="text"/> | | | |
| Direction <input type="text"/> | | | |

Keep on learning - these Quick Sheets will build on what you have learnt here:

| | |
|---|--|
| 4.1 - Printing Canvass Cards & 4.14 Exporting to Minivan | Use scripts to prepare for a canvassing section. |
| 5.1 - Grid View & 5.5 Barcode entry | Learn how to enter data using Scripts. |
| 5.3 Form View | Learn how to enter data using a form. |
| 7.2 Create a Virtual Phone Bank | Learn how to use a script to prepare for phone canvassing. |
| 10.2 Script Set-up & 10.5 Form Set-up | Learn how to create and manage your own Scripts and Forms. |

**Watch training videos at Member.LibDems.org.uk/Skills
Get support on Facebook - search for Connect Users**

What

This quick sheet will go over the layout and format of standard Canvass Cards produced by Connect.

Why

Understanding the Canvass Card format is essential to effective canvassing.

Where

For this Quick Sheet, the 'where' is on the clipboard when you are canvassing. For printing the Canvass Cards, see Quick Sheet 4.1.

The cover sheet

Header

The header will tell you the name of the list you are working from (My List in this case), the script you are using and the number of people and doors you have on your canvass cards.

Canvass Results Key

If we don't manage to speak to someone on the door, it's useful to know why. So that, for example, if someone has moved or died, we don't try to speak to them again.

Script

The script contains the questions we want to ask the voters on the doorstep. You don't have to follow the script word for word, but try to stick to it as best as you can. It is important for how Connect works that as much as possible we record accurate answers to specific questions.

My List
 Script: **Canvass Script (Con facing)**
 People: **115**
 Doors: **64**

| Canvass Results Key | | |
|---------------------|----------------|---------------------|
| Not Home = NH | Deceased = DC | Other Language = LG |
| Refused = RF | Moved = MV | |
| Inaccessible = IN | Come Back = CB | |

Hello, my name is _____, and I'm calling on behalf of your local Lib Dems.

Party: For which party do you normally vote at the national level?

- L = Def Lib Dem
- I = Prob Lib Dem
- C = Conservative
- c = Soft Conservative
- B = Labour
- b = Soft Labour
- G = Green Party
- U = UKIP
- N = BNP

Party: If you usually support Labour here, would you be willing to back the Lib Dems this time to make sure we beat the Conservatives?

- Y = Yes
- N = No
- M = Maybe

[If they vote Lib Dem ask if they would like to display a poster and/or help]

Poster Wanted: Will you display a poster...

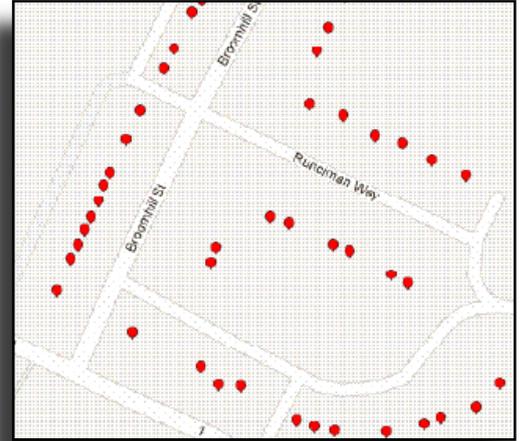
Visibility: Poster Wanted

Deliverer: Would you be willing to help distribute Lib Dem Literature in your area?

Volunteer: Deliverer

Map

After the cover sheet, the next page will contain a map of the area you are going canvassing. On the map will be a number of dots, each showing the location of a property you are to call on.



Canvassing results

On the rest of the pages in your canvassing pack will be the details of your voters. Alongside these is the area to enter the canvassing results.

Name of the constituency you are canvassing in.

Code of the Polling District you are canvassing in.

Code of the Walk you are canvassing in.

These tick boxes are for marking voters you did not speak to. The codes are shown in the Canvass Results Key section of the Cover Sheet. Eg NH = Not Home.

| | | | |
|---|------------------------------|---|---|
| Berwick-upon-Tweed · B5AMBL · [No Default Walk] | | | |
| Danielle Forster 3 Broomhill Street | 151027 Age: Sex: F | <input type="checkbox"/> NH <input type="checkbox"/> DC <input type="checkbox"/> LG <input type="checkbox"/> RF <input type="checkbox"/> MV <input type="checkbox"/> IN <input type="checkbox"/> CB | Party ID L I C c B b G U N Sq Lab 2 Y N M <input type="checkbox"/> Delivers <input type="checkbox"/> Poster |
| Amber Rogers 4 Broomhill Street | 942035 Age: Sex: F | <input type="checkbox"/> NH <input type="checkbox"/> DC <input type="checkbox"/> LG <input type="checkbox"/> RF <input type="checkbox"/> MV <input type="checkbox"/> IN <input type="checkbox"/> CB | Party ID L I C c B b G U N Sq Lab 2 Y N M <input type="checkbox"/> Delivers <input type="checkbox"/> Poster |
| Danielle Willis 4 Broomhill Street | 942034 Age: Sex: F | <input type="checkbox"/> NH <input type="checkbox"/> DC <input type="checkbox"/> LG <input type="checkbox"/> RF <input type="checkbox"/> MV <input type="checkbox"/> IN <input type="checkbox"/> CB | Party ID L I C c B b G U N Sq Lab 2 Y N M <input type="checkbox"/> Delivers <input type="checkbox"/> Poster |

This section shows the names and addresses of voters along with a barcode for quicker data entry.

This section gives further information on the voters, such as VAN ID, Age, Sex, past voting intention etc.

This section is where you enter the answers from the voters you speak to. The first line relates to the first question in the script on page. The letters relate to each answer shown.

After the questions, the tick boxes refer to the tags included in the script. Simply circle and/or tick the answers given.

Each household is separated by a solid black line. Voters in the same house are separated by a broken line.

Keep on learning - these Quick Sheets will build on what you have learnt here:

| | |
|-------------------------------------|---|
| 4.1 - Printing Canvass Cards | Start canvassing right away by printing out some cards. |
|-------------------------------------|---|

| | |
|--|---|
| 5.1 - Grid view & 5.5 Barcode entry | Learn the quickest ways to enter data that you have gathered from canvassing. |
|--|---|

**Watch training videos at Member.LibDems.org.uk/Skills
Get support on Facebook - search for Connect Users**

What

Canvass Analysis and Target Pools are fields for your voters that are automatically generated by Connect.

Why

Canvass Analysis and Target Pools enable you to more accurately assess and target voters based on what they think about different parties.

Where

You will find the Canvass Analysis and Target Pools fields in each individual voter's record and in the Create a List screen.
You will also use Target Pools when producing target letters.

Canvass Analysis

Over years of campaigning you will build up a history of voters' voting intentions.

Many local parties will already have many years worth of campaigning data imported into Connect from previous databases.

All of this information can be used to send voters individually targeted campaigning messages.

What Connect does is to combine all your canvass data into a single 'Canvass Analysis' field which tells you which party or parties the voter is most likely to vote for.

Single Party Canvass Analysis

If a voter has only ever indicated support for one party, then their canvass analysis will only show that party. E.g. Conservative, Green etc.

This may be preceded by 'Weak' if the data is old or 'Strong' if the voter has indicated a preference for that party repeatedly.

Two Party Canvass Analysis

If a voter has indicated support

for more than one party in the past, then the Canvass Analysis will include both parties. The party the voter is more likely to vote for will be represented by its name, while the weaker will appear as a colour.

So for example, a voter who mostly votes Conservative but leans to the Lib Dems will have the Canvass Analysis of Yellow Conservative.

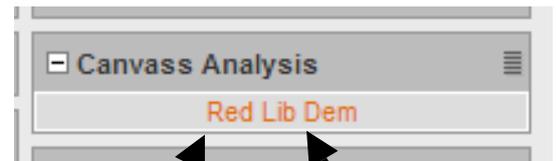
Notes on Canvass Analysis:

- More recent data has a higher impact on the Canvass Analysis than older data.
- The 'Nationalist' part of Canvass Analysis refers to SNP in Scotland, Plaid in Wales and UKIP and BNP in England. (In Scotland and Wales, UKIP and BNP do not affect Canvass Analysis).
- The Green Party is represented in Canvass

| Address | Locality | Post Town | Postcode | Canvass Analysis | Party |
|----------------------|----------|-----------|----------|---------------------|--------------|
| Adamsdown | | Cardiff | CF24 1LT | Weak Lib Dem | Lib Dem |
| Adamsdown | | Cardiff | CF24 1QA | Weak Lib Dem | Lib Dem |
| Adamsdown, Cathays | Cathays | Cardiff | CF24 4LS | Lib Dem | Lib Dem |
| Adamsdown, Cathays | Cathays | Cardiff | CF24 4LS | Lib Dem | Lib Dem |
| Adamsdown, Cathays | Cathays | Cardiff | CF24 4QL | Yellow Conservative | Conservative |
| Adamsdown, Cathays | Cathays | Cardiff | CF24 4QW | Weak Lib Dem | Lib Dem |
| Adamsdown, The Hayes | | Cardiff | CF10 1BN | Strong Lib Dem | Lib Dem |
| Adamsdown, The Hayes | | Cardiff | CF10 1BN | Strong Lib Dem | Lib Dem |
| Adamsdown, Cyncoed | Cyncoed | Cardiff | CF23 6AQ | Lib Dem | Lib Dem |
| Adamsdown, Cyncoed | Cyncoed | Cardiff | CF23 6BQ | Weak Conservative | Conservative |
| Adamsdown, Cyncoed | | Cardiff | CF23 6UU | Weak Lib Dem | Lib Dem |
| Adamsdown, Cyncoed | | Cardiff | CF23 6UA | Weak Labour | Labour |
| Adamsdown, Cyncoed | | Cardiff | CF23 6UA | Weak Labour | Labour |
| Adamsdown, Cyncoed | | Cardiff | CF23 6UE | Lib Dem | Lib Dem |

Above: Canvass Analysis as displayed in the 'My List' screen.

Below: A voter's Canvass Analysis displayed in their individual record.



The colour represents the party the voter leans towards

The party named is the party the voter is most likely to vote for.

Analysis, but other minor parties and Independents are not.

- Occasionally, if a voter has indicated support for more than two parties, they may have the Canvass Analysis of 'Unaligned'

Target Pools

Letters that you send to voters will be most effective if they are tailored to the individual voter.

Target Pools enable you to do this quickly and effectively with very little effort.

Tory & Labour facing

These two pools are the ones you want to use to target voters based on their voting intention.

You will only use one of these, depending on who your main opponent is.

For each pool, voters are put in to one of the following categories:

1. Supporters - Likely to vote Lib Dem
2. Switch - Have indicated support for Lib Dems and main opponent
3. Squeeze - Have indicated support for third or smaller parties alone, or in addition to the Lib Dems
4. Stay at Home - Likely to vote for your main opponent.
5. Unknown - Voters with no canvass data.

| Target Pools | |
|---------------------|--|
| Letters | Letter16 |
| Register History | Voted in recent national election ONLY |
| Tory facing | Switch |
| Nat / Labour facing | Con Squeeze |

All voters are put in to one category for both the Labour facing and Conservative facing pools, though you will only need to use the one that applies to your seat.

For seats in Wales or Scotland fighting Nationalists, you can use the options inside the 'Nat / Labour' facing pool. A Green facing Pool is available on request.

Register History

This target pool is based on

which elections people have voted in. It is automatically generated from your marked register data.

You can use it to target voters based on how likely they are to vote.

Letters

The letters pool is not automatically generated and can be set up by your local Constituency Manager (see Quick Sheet 5.6 - Bulk Uploads)

| | Con Facing | Lab Facing |
|--------------|--------------------------------------|------------------------------------|
| Supporters | Lib Dem | Lib Dem |
| Switch | Yellow Conservatives & Blue Lib Dems | Yellow Labour & Red Lib Dems |
| Squeeze | Labour, Greens, UKIP, Plaid | Conservatives, Greens, UKIP, Plaid |
| Stay at Home | Conservative | Labour |

Table: Which Target Pool voters are in (England and Wales only)

Keep on learning - these Quick Sheets will build on what you have learnt here:

3.1 Create a New List

Use your knowledge of Canvass Analysis and Target Pools to build lists of voters

4.3 Split Mailings

Write targeted letters to your voters using the Target Pools

Watch training videos at Member.LibDems.org.uk/Skills
Get support on Facebook - search for Connect Users