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HOW TO GUIDE
ON VIRTUAL CANVASSING

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United States® Census 2020

National Congress of American Indians

How-To guide on Virtual Canvassing

What is canvassing?

Typically, canvassing is done in person with groups of people meeting together at a launch location where they are first trained, then sent out to canvass locations to knock on doors. Once completed, the canvassers then return to the launch location to report their results and debrief with the organizers. Other forms of traditional canvassing might include tabling at an event or other social gathering.

Now, as we cannot gather in mass, we need to switch to virtual canvassing strategies, which include phone banking, social media groups, Facebook Live/Instagram Live, and other mechanisms as primary outreach strategies. Here you will learn how to conduct a phone-banking exercise as a way to virtual canvass.

Preparation for virtual canvass:

To virtual canvass, you will first need to ensure you have access to reliable contact information for the people you are looking to contact. In this case of census canvassing, you will want to be sure you have correct phone numbers so that you can make contact. Once you have this information, it's time to prepare volunteers for training.

- Schedule a date and time in advance so you can have time to recruit canvassers for the phone bank.
- Set up a video chat/meeting like Zoom or Blue Jeans to hold a training for canvassers before they begin calling.
- The canvassers will need to be sure they have a phone and laptop as well as access to reliable internet for the training.

Training before beginning to canvass:

During the training, the organizer should explain the goal of the canvass; in this case, it is to make sure people in the community fill out their census form. The organizer should provide a prepared script for canvassers, and walk them through a typical call, and give directions as to how to record their interactions.

Creating a Script

The canvass call script should have a scripted introduction/greeting and then move into questions for canvassers to ask and track as they record their interactions with the person, such as:

- "Have you filled out your census form?"
- "Did you do it online, over the phone, or send it in the mail?"
- "Have you received any mailings on the census or invitations to take part in the census?"

In the training, the organizer should also go over how to deal with a difficult person or what to do if there is no answer. There should be multiple numbers for the canvassers to call as they are more than likely to call more numbers than they will have answers.

Canvassing begins:

Once the training is complete and questions are answered, the canvassing can begin. All canvassers should remain on the Zoom/Blue Jeans computer call while using their phones to complete canvass calls. Remind everyone to make sure their Zoom/Blue Jeans platform is muted and that your own sound is off as well – this will help prevent any feedback or distraction to others when folks begin making calls. Keep in mind:

- While some may want to disconnect from the Zoom/Blue Jeans call, it is best that everyone stay on in case of questions or just to socialize when taking a break.
- Depending on the size of your call list and the number of canvassers, you may want to have scheduled breaks if you know that it may take a few hours to complete all calls.
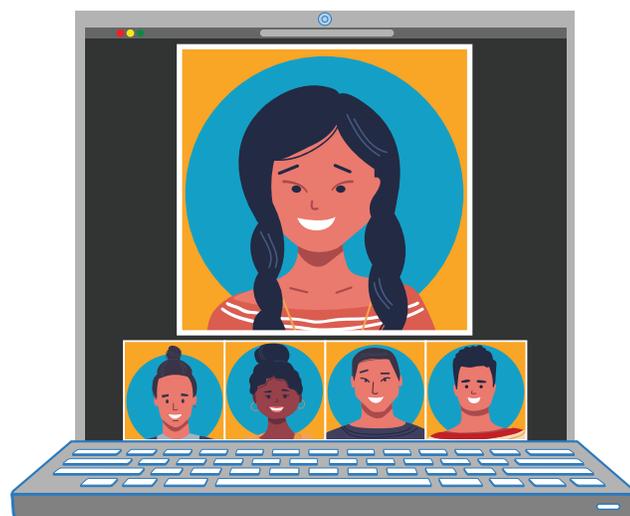
Wrap Up and Debrief:

Once all calls are finished, you can have everyone unmute and go over their interactions with folks on the call. You want to hear how people are reaching to and taking part in the census, what issues they may be facing, and any misinformation that people might be hearing about the census. Make sure that canvassers send you their results of their calls so that you, the organizer, can:

- Review and determine if call-backs are necessary to answer any questions.
- Follow up on any notes.
- Determine whether to reuse the call list if canvassers did not have a high contact rate.

For the latest census information visit:

www.IndianCountryCounts.org