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**Thank you for stepping up to host a phone bank!** These events are an opportunity to connect directly and foster a connection with people that want to get together for a common goal. We know that community organizing is about building relationships, and making calls is one way to do that. When making calls, we have an opportunity to have conversations about issues with a high volume of fellow community members, while strengthening the OFA volunteer network.

The millions of Americans who’ve taken action with OFA are part of a long line of people who stand up and take on the big fights for social justice, basic fairness, equal rights, and expanding opportunity. That kind of progress is never easy -- it requires planning and people taking action.

We’ve created this guide to help you to host an effective and productive phone bank. So, let’s get started!

**Mobilize America**

We are asking our volunteers to host in-person phone banks in their community and sign up for phone banks that are posted on [our Mobilize America page](https://app.salesforceiq.com/r?target=5b9ff6f94cedfd00769c44a8&t=AFwhZf0yPmilq6fDM8W8du4-sewkPSVMxr4-4YkS_OcwTdetPIgF1RTAiB6_-MIRPofG8Egk5XUU8UlQG2d7VLHYlbGuVqfx_9Kia1bvw2qGvSQTo4lpaq_qodXJqFj0kaoYpxFNqgma&url=http%3A%2F%2Fofa.bo%2Fmobilizeofa).

Volunteers will need their phone and a computer or tablet in order to make calls -- don’t forget your charger!

If you have any questions, you should feel free to email us at organizing@ofa.us with the subject line “Phone bank.”

**What’s your phone bank for?**

Before you start recruiting or trying to find a location, you first need to understand the scope of your phone bank. Questions to think about as you start planning:

* What is the purpose of the phone bank -- for example, specific legislation or ballot initiatives?
* How many calls need to be made? This will help you understand how many people you need to recruit.
* Are you asking people to come to a physical location or are they making calls remotely? (It is always better to make calls as a community!)

Once you have these answers, it’s time to start recruiting.

**Who should you invite and how do you recruit volunteers for your event?**

Once you determine your reason for hosting a phone bank -- whether its calling to push for specific legislation, letting your neighbors know there is an important ballot measure that needs to be supported, or asking them to support a specific candidate -- then it’s time to pull a group together to make some calls. Fundamentally, organizing is about building relationships -- the larger and more cohesive a group you have, the greater your effectiveness will be. Therefore, you should invite anyone -- no matter their level of experience -- to your phone banking event.

You should set a goal of how many people you need and then invite double that number -- inevitably people say “yes” but then can’t make it. We have 3 tips for staying in active communication with your phone bankers to help reduce the number of people who don’t show up:

1. **Ask people to RSVP.** When asking for someone to join your phone bank, you should include the specific location, time, and date and who and why you are making calls. You will also need to let them know what equipment they need to bring: Computer, phone, power cords, headphones, etc.
2. **Confirm their attendance**. This is a short phone conversation or quick voicemail. Follow up with an email.
3. **Send a final reminder**. The day before your phone bank, be sure to send an email reminder to your participants with all the info -- location, time, date, what they need to bring.

**Select a location**

There is a lot to consider when deciding where you should host your phone bank. Many phone banks are hosted in the comfort or someone’s home, but sometimes that is not always an option. Here are some questions to consider when deciding on the optimal space:

* How many people am I expecting? (be realistic in your estimate)
	+ Can my home accommodate this many people who need space to make calls? If not, consider checking the availability of a local library, community center, schools, or even faith institutions.
* Does this environment permit loud conversation?
	+ Is there room for people to spread out to make calls without being distracted by others?
* Are there distractions in the space that be challenging for hosting a phone bank?
* Is there WiFi? Is there adequate phone service?
* How will you gain access to the space? Do you need to obtain a key? Will the building have staff who will meet you, or will it be open?
* Are there enough outlets for multiple devices?
* Is it a physically accessible space?
* Is there parking available?

**Select a date**

The date and time you select for your event is equally as important as the location. You will want to consider a time that is conducive to majority of people’s schedules. Again, setting up a recurring phone bank will be helpful so people know if they can’t make it one week, they can join in the following week.

* What is the maximum amount of time volunteers are willing to dedicate to phone banking? Most phone banks last between 2-4 hours.
* Are there shifts available for a longer phone bank period?
* Are there any holidays or local days of observance approaching?
* What are the typical work hours for your community?
* Who is your audience, and when are they most likely to be home to answer the phone?

To determine when a majority of your volunteers are available, it may be useful to send out a survey with several options of dates and times for your event. You can then tailor your recruiting around the selected date. Additionally, hosting multiple phone banks on different days and times of the week gives volunteers many different options to join in.

**Assign roles**

Particularly for larger phone banks, you can delegate roles to others so you can make sure everything is running smoothly and on time. Ask for folks who can wrangle the food/snacks or would be willing to walk through the orientation training. If you know someone who loves troubleshooting, ask him/her to be the “tech support guru.” If you have veteran phone bankers, pair them with new phone bankers so that they can help coach them.

**Training your attendees**

You may have veteran phone bankers and you have some who have never done this before, so taking 10-15 minutes at the beginning to orient everyone to the task at hand is critical. You will want to share your goals and motivation for hosting the phone bank and how many calls you are expecting people to make.

You will need to go over your method of making calls (whether it is a virtual phonebanking platform or good-old-fashioned call sheets) as well as share some best practices and pro tips that will help new folks especially feel comfortable making calls.

**Sample agenda (based on a 3 hour event)**

* 6:00 pm -- Welcome and introductions
	+ Give people time at the start of the phone bank to mingle and meet each other
		- They should be sure to sign in and grab some snacks (if available)
	+ Welcome and thank the group for coming
	+ If you have a small enough group, spend 10 minutes going around the room to make brief introductions: You can ask people to share a fun fact about themselves.
* 6:20 pm -- Overview and orientation training
	+ Briefly review the plan for the phone bank, introduce yourself and your own motivation for hosting the phone bank.
	+ Review phone banking tips & tricks
	+ Review the script so volunteers have an idea of what to expect
	+ Using the script, spend 5-10 minutes role-playing a conversation
		- PRO TIP: Pair veteran phone bankers with newer ones
* 7:00 pm -- It’s go time!
	+ Each volunteer should have set up their computer or call packets
	+ Take short breaks to recharge as a group
	+ Do something fun to celebrate good calls (e.g. have volunteers ring a bell or yell “Bingo!”)
* 8:30 pm -- Closing and next steps
	+ Determine when you will get together again
	+ Ask each person to name one person they are going to invite to join the movement
	+ Share one hope for 2018 (in one sentence)
* 9:00 pm -- Event wraps

**Checklist for a successful phone bank**

Before the event

* *Create an agenda, assign roles, and prepare materials*
	+ Create an agenda based on the length of your event that builds in time for introductions, a brief orientation training, making the calls, and a discussion of next steps.
	+ Make sure you have printed enough scripts and any other materials that you may need (i.e tips and tricks sheet, call guides…) OR if you are using online tools, that everyone is up and running on the WiFi.
	+ [Prepare a sign-in sheet](https://app.salesforceiq.com/r?target=5b9ff6f94cedfd00769c44a9&t=AFwhZf0yPmilq6fDM8W8du4-sewkPSVMxr4-4YkS_OcwTdetPIgF1RTAiB6_-MIRPofG8Egk5XUU8UlQG2d7VLHYlbGuVqfx_9Kia1bvw2qGvSQTo4lpaq_qodXJqFj0kaoYpxFNqgma&url=https%3A%2F%2Fdrive.google.com%2Fopen%3Fid%3D1T8snWPul1HQfnxSNgL2wCoIIbg0Vj0zs) for your guests so that you can keep track of who came and who you could invite in the future.
	+ Create name tags for your volunteers so that they can get to know each other. You may know everyone, but they may not.
* Step 2: *Organize and arrange your space*
	+ Make sure that the space has little distractions as well as strong cell phone and WiFi reception.
	+ When multiple people are making phone calls at once, it can get loud; make sure that your space has enough room for people to spread out and feel comfortable.
	+ Consider having charging strips or areas where people can plug in their phones, if needed.
	+ Also, if possible, consider having spare phones/computers for those who don’t have one.
* Step 3: *Check your devices*
	+ A phone banking event won’t be that effective if your devices don’t work. It is very important that you check your devices and the cell/internet service prior to the event to make sure everything is working.
	+ If you are using an online caller, be sure to confirm you can log on -- both via phone and by computer.
* Step 4: *Provide snacks and beverages*
	+ Who doesn’t love snacks!? Phone banking can sometimes feel laborious, so you may want to have snacks and beverages for your volunteers. At least make sure water is available!
	+ Consider having a potluck, so that you are removed from some of the responsibility. This way, you will be able to focus more on the logistics of the event.

**During The event**

* *Connect with your guests*
	+ Once your volunteers have arrived, take some time to let everyone get acquainted with one another.
	+ Make sure they sign-in!
	+ Being a phone bank host should be an *active* role - make sure you are constantly checking in with your volunteers to make sure they are comfortable and have all the materials they need to make their calls. If you see one of your volunteers struggling, give them some extra coaching. A little support goes a long way for new volunteers.
* *Overview and Training*
	+ Briefly go over your motivation for hosting your phone banking event (connecting with people on the issues they care about, recruiting volunteers, etc…)
	+ Set a goal of how many calls you want to make as a group during your event. You could consider making a visual goal tracker of calls made, or even other goals like volunteers recruited or supporters identified (depending on the purpose of the call).
	+ Share any technology information that they may need to know (WiFi passwords, charging strips, outlets, etc).
	+ Inform your volunteers on how to input their call data
	+ Go over tips and tricks for effective phone banking for the volunteers who may be new to it.
* *And action!*
	+ In order to respect the time of your volunteers, try and keep to your schedule by starting on time
	+ Break out into your assigned roles and hit the phones! Remember that the script should act as a guide, not a formula you have to abide by.
	+ Consider pairing new phone bankers with more experienced ones
	+ Report out your progress-to-goal during the phone bank so that the group feels motivated to accomplish your goal together
	+ Remember to HAVE FUN! Your volunteers shouldn’t feel this is a chore. Keep the atmosphere energized by taking short breaks and celebrating awesome contacts. Consider turning your phone bank into a friendly game or competition (i.e ring a bell or round of applause).
	+ Take photos or videos and share the story of your phone banking event on social media. Make sure you tag @OFA and use our the hashtag #OrganizingFor18 so the OFA network can see your amazing work!

**After the event**

* Clean Up
	+ Rearrange the room back to its original order, and collect all the materials that may have been used (scripts, power strips, pens, etc).
* Debrief
	+ Bring your volunteers together before you leave for the evening to discuss how it went. Have each participant share one story from their phone banking and one person they could invite to the next one.
	+ Leave your volunteers with an ASK. Talk about next steps you can take as a group. When is your phone bank going to be? Who else can you get to join your team?
* Maintaining your network
	+ Within the next 2 days, call your participants to thank them for coming. Follow up on any future events you discussed during the debrief.
	+ Make sure you also call those who couldn’t attend. Just because they couldn’t make it this time, doesn’t mean they won’t be interested in the future.

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**ORIENTATION TRAINING**

* Overview and orientation training agenda
	+ Start with why you all are here and get folks fired up and ready to make calls.
	+ Make sure everyone is able to access the online dialer or understands the process for recording data on a call sheet
	+ Review phone banking tips & tricks (see below)
	+ Review the script so volunteers have an idea of what to expect
	+ Using the script, spend 5-10 minutes role-playing a conversation with a fellow volunteer
		- PRO TIP: Pair veteran phone bankers with newer ones

**Phone bank tips and tricks!**

Like any skill you are working to perfect, phone banking takes practice. We recognize the challenges that come with talking to strangers, and have designed a helpful guide to assist you throughout this process.

1. **Stay on message**
	1. Always remember the goal of your event, whether it is to identify volunteers or talk to community members about issue campaigns-- don’t get sidetracked by arguing over a specific point with a caller!
		1. Remember, you should remain professional and embody the values of respect, empower and include. If you have someone particularly challenging on the phone, politely thank them for their time and move to the next caller. Feel free to take a break if you need to!
	2. Each time you make a call, you have a unique opportunity to inspire someone to get involved and stand up to injustice; be sure that you are positive, engaged, and confident in your ask with each and every conversation.
	3. If you do not reach someone, you should not leave a message in most cases. There are instances where you can leave a message, especially when making confirmation calls or calling a very specific list of volunteers. However, when calling people and general volunteers lists, it is usually best to simply move on to the next call.
		1. *Think of it this way -- if your contact rate is 10%, that means you will only talk to 10 out of 100 calls. Phone banking is about quantity and quality -- leaving messages reduces our chance of actually speaking to someone.*
	4. For the reasons above, make sure you’re spending an average of 3-5 minutes with each person you call. We have a lot of people to get through, so you’ll want to make sure that you’re focusing on having high quality and a high quantity of conversations.
2. **Be realistic**
	1. Don’t be dismayed -- getting through to people generally takes a few tries. On average you will have a 10% contact rate.
	2. Take nothing personally! Understand that not everyone is going to agree with you and that’s okay.
3. **Get in the right headspace**
	1. Make yourself comfortable! The great thing about phone banking is that you can do it from almost anywhere. Put on some comfortable clothes, find a nice seat, and get to calling.
	2. Do what you can to limit the extraneous noise around you. It may be helpful to put in headphones to reduce the number of distractions.
4. **Be Human**
	1. Nobody enjoys feeling like they are talking to a robot. While you have a script to help you, it should act as a guide, not a template you have to follow.
		1. You will role play with a fellow volunteer before making your first call to get a feel for the flow of the conversation.
	2. Express enthusiasm. The people you call will respond to your energy, so maintain a high degree of optimism for the cause throughout each call.
5. **“We” vs. “Me”**
	1. Express to the people you call that their vote matters, and it is the collective effort of our actions that will get us the results we want.
	2. Try and empathize with the people you talk to. Is there an issue you are both passionate about? A ballot initiative you both want to see passed? Use that connection to articulate the importance of voting or volunteering.