

Stand with Dr. Dean

Organizing a Phone Bank

Phone banking – calling community members to discuss candidates and issues – is easy and it's one of the best ways to contact people about elections and politics. Phone banking has a high impact because it allows for two-way communications between the campaign and community members.

Phone banking is an important part of the Stand with Dr. Dean campaign. It allows you to:

- Educate communities on healthcare and the Stand with Dr. Dean campaign
- Engage and build personal connections with people over the phone
- Network with progressive activists and healthcare advocates you might not otherwise meet

Before your Phone Bank

1) Set goals

Set clear, quantifiable goals for yourself and your canvassers. Setting tangible goals will make recruiting volunteers much easier and put your work in context of the larger campaign.

Start at the end goal – healthcare reform with a public option – and work backwards: get local elected officials to sign pledge, get community members to sign pledge to pressure local officials, knock on doors to get community members to sign pledge.

Then, fix real numbers to goals based on what local official you're lobbying – mayor, state legislator, congressperson, etc.

- Goal 1: Dial 900 numbers in two hours
- Goal 2: Make 300 contacts in two hours
- Step 1: Recruit 20 volunteers
- Step 2: Have 10 volunteers turn out
- Step 3: Dial 90 numbers per volunteer
- Step 4: Make 30 contacts per volunteer
- Step 5: Get 10 petition signature pledges per volunteer
- Step 6: Recruit five new volunteers

2) Find a venue

Once you've set your goal and you know how many volunteers you'll be working with, you need to resolve some details:

- When and where should the phone bank be held? Is it small enough to hold at home?

- Do you want to find a local business or law firm that will let you use their office's phones for an evening?
- Do you want to host a house party and have volunteers call from their cell phones in your living room?
- What strategies should be used to get the word out?

Quick tip:

Looking to make the maximum impact? Phone banks are most successful during the week (Monday through Thursday) from 4 to 8 p.m.

3) Recruit volunteers

Start recruiting close to home:

- Family, friends and neighbors – those with a personal connection to you will be most likely to commit time and turn out to your event
- Progressive activists – people with a declared interest in healthcare reform and progressive politics
- Websites – social networking websites like Facebook will help get the word out fast
- Bring a friend – encourage your volunteers to bring people they know who are interested in healthcare reform and progressive politics

Also, let the DFA Field Team know that you're holding an event. We can help you:

- Create an event on DemocracyForAmerica.com and invite other DFA Members
- Send an e-mail blast to DFA Members in your area alerting them of the event

(Contact us at field@democracyforamerica.com.)

As the event approaches, you need to follow-up with everyone who has committed to volunteering to make sure they actually turn out to the event:

- Follow-up with RSVPs through e-mail, phone, and whatever other contact information you have for them
- Make sure everyone knows the date, time and meeting location, including the actual street address

Quick tip:

Usually only half of those who commit to volunteering will actually turn out to help, so be sure to consistently follow-up with those who pledge their time.

4) Gather your materials

Make sure you have everything you need for the phone bank:

- Call list (the people and numbers you'll be calling)
- Cell phones and cell phone chargers
- Clipboards
- Pens / pencils
- Phone script
- Snacks
- Water

At your Phone Bank

1) Greet your phone bankers

Your phone bank is a great way to build a list of progressive activists and healthcare advocates in your area for future actions. You'll want to make sure to get contact information from your guests and take the time to greet each person.

- Set up table with sign-in sheets and pens near the entrances and encourage guests to sign in
- Introduce yourself and thank guests for coming as they arrive

Give latecomers a few minutes to arrive, but don't start more than five minutes late. Running any later will discourage those phone bankers who arrived on time and may lead them to come late to future actions.

Take a moment to call the event to order and re-introduce yourself and have all your volunteers quickly introduce themselves just before you get started. Be sure to thank everyone for coming a second time. For example:

"Hi everyone. My name is Jane Smith and I'm a Smalltown DFA organizer. I'd like to thank you all for coming. We're about to get started, but I want to remind everyone that refreshments are in the kitchen. Now, let's go around the room and say our names and one reason we're here tonight."

Once your event gets underway, just remember one thing: Have fun.

2) Phone bank

Phone banking is easy. It gives activists an opportunity to talk about candidates and issues that excite them and talk to people who share their enthusiasm. Try to keep some of these tips in mind when you're phone banking:

- Smile to keep your calls friendly and your energy level high
- Never dominate the conversation – ask the person you're calling some questions and try to start a real conversation on healthcare and it affects everyone
- Move around and encourage others to do the same to keep the energy level high while everyone is making calls
- Make as many calls as possible yourself to lead by example
- Keep your phone bankers well-stocked with water
- Keep good records – make sure your phone bankers are taking good notes and keeping their sheets clean of doodles so that you can send the information back to us and we'll note the bad numbers to save everyone some time on future phone banks
- Have your script, contact sheets and other materials in order
- Have fun!

After your Phone Bank

1) Thank your volunteers and recap

Be sure to end on time and recap the event with your volunteers to discuss the pros and cons:

- What went well?
- What could have gone better?
- What did you learn from the event?
- Did everyone have fun?

Be sure to thank everyone one last time before they leave.

2) Tell us how it went!

Send your feedback and pictures to field@democracyforamerica.com. We'd like to hear and see how great it was! And, with your permission, we'd like to share your stories and pictures with other DFA Members across the country.

Finally, send us your sign-in and call sheets. You can send them to us by mail, e-mail or fax:

Mail:
Democracy for America
P.O. Box 1717
Burlington, VT 05402

E-mail: field@democracyforamerica.com

Fax: (802) 651-3299