



HOST GUIDE

Remote Phone Bank

Thank you for hosting a Swing Left Remote Phone Bank! Working together, we have the power to defeat Trump, take back the Senate, defend the House, and win the state-level races needed to ensure fair maps following the 2021 redistricting process. We have a lot of work to do, so thank you for being a part of this movement.

Our Swing Left groups and hosts made millions of calls in 2018—at home and at organized phone banks. As we all know, social distancing is an important tool to contain the spread of COVID-19. We encourage you to practice social distancing by avoiding holding large in-person gatherings. (For further qualified guidance on social distancing, we recommend referring to local health authorities, like your state government’s website.) Even if you aren’t in the same room, remote phone bank hosts can support volunteers and help them make crucial voter contact to turn out voters.

Event Goals

1. Bring your friends and other Swing Left volunteers together in a digital-only space and get them excited about working on races up and down the ballot [in Swing Left’s 12 Super States](#). These states are key to winning 2020’s most important fights: flipping the Senate, taking back the White House, and ending Republican gerrymandering. If your group wants to learn more, check out [Swing Left’s 2020 Strategy](#).
2. Create connections - even while we are stuck at home. This is the most important step toward building a movement, so take the time at your virtual event to get to know each other, create a sense of shared purpose, and build community.
3. Encourage your volunteers to step up in 2020—whether that means hosting their own remote phone bank, letter writing party, or virtual fundraiser for candidates, and more!

Planning Your Remote Phone Bank

There are two main ways that you can design your volunteer remote phone bank experience. Either can work depending on your phone bank goals and volunteer needs:

1. Host a “flexible” phone bank. You’ll plan a phone bank orientation call (or several calls) to train volunteers on the goals of the phone bank, the script, and the software. Volunteers make calls on their own time over a weekend/week. You might offer tech support “office hours” at various points over that timeframe. Volunteers and hosts meet back together at a later date to debrief how the calls went and provide feedback.
2. Host a “fixed” phone bank. You’ll set a specific time for all your volunteers to make calls. You’ll kick-off the session with orientation and training and launch volunteers to make calls immediately. You can stay on your video conference to offer script and tech support if volunteers need to join for one-on-one help. You ask volunteers to come back at a specified time “X” hours later to debrief the calls.

Here’s how to get started.

- ❑ **Identify your phone bank software and phone lists.** If you aren't already in touch with the Swing Left field team member for your region, contact host@swingleft.org.
- ❑ **Determine which structure of remote phone bank you’d like to host.**
- ❑ **Get training on hosting a remote phone bank** by reviewing a [training recording](#) or [requesting a training session here](#).
- ❑ **Test out the script and software.** Learn the script and how to record data. [Here’s some common tips for coding your data.](#)
- ❑ **Choose a video conference option** that will suit your event. Video conferencing is a key part of your Remote Phone Bank to train and support volunteers. There are several options, including the opportunity to “borrow” a Zoom account from Swing Left for the duration of your party. [You can learn about these options here](#). Volunteers can join video conferencing with their computer and webcam, but can also still participate if they don’t have a webcam (by audio only) or with their phone (if they don’t have a computer). Reach out to us at zoom-help@swingleft.org to request use of a Zoom account for your party (or other virtual events).

- ❑ Once you've confirmed your conferencing tool and date, list your event on [Swing Left's public calendar via Mobilize](#), so people can find it. ([Learn how to create a Mobilize virtual event here.](#)) You can also list the event privately if you choose.
- ❑ **Invite your friends, family, neighbors, and colleagues.** You can also reach out to local aligned organizations and [Swing Left groups](#) who might be interested in promoting your event. Learn best practices for how to do this in the [Swing Left Recruiting and Promotion](#) guide.
- ❑ **Ask your invitees to help out at your event.** Experienced phone bankers can help answer questions in chat or support getting volunteers set up on your phone bank software.

Getting Ready for Your Virtual Event

Just like a live event, there's steps you need to take to prepare for your event.

- ❑ **Test out video conferencing and share instructions ahead of the event with attendees.** You'll want to test audio and screen-sharing on your computer before the event. Enlist another volunteer to help you test the video conferencing to make sure it will work when your party attendees are on the line. Take notes on how the features of the conferencing tool work and provide these instructions to your attendees ahead of time. Check out our [virtual organizing hub for more information on video conference options.](#)
- ❑ **Create a volunteer instructions document/guide that you send when you train volunteers on the software and script.** Volunteers will use this document to access phone bank links and other resources. Using a Google Doc or other live document can be helpful if you expect the phone bank link to change (because scripts or names run out) while volunteers are calling. Here are examples if you are using the [NGP VAN Open VPB \(Virtual Phone Bank\)](#) software and if you are using [List Fixer](#).
- ❑ **Let volunteers know how to prepare to participate in your virtual event.** We recommend providing all of this information in the "Additional info for attendees (optional)" field under the "Event Logistics and Accessibility" section of your Mobilize event so that the information is sent in the automated email that goes out when they register. This is described in our [Mobilize Virtual Event Tips Guide](#). Then send

follow-up emails before the event to ensure they are ready - there is a sample template in this guide. Here's what attendees need to do before your party:

- ❑ **Gather their materials - a phone, a computer/tablet, and headphones.**
- ❑ **Set up a Google Voice Phone Number (Optional).** If your phone bank software requires volunteers to call from their own phone number, some volunteers may prefer to set up a [Google Voice number](#) to use instead.
- ❑ **Understand how to join your remote phone bank with your chosen video conferencing tool.** Most are easy to use and provide help content online that you can link to.
- ❑ **Optional: Host a pre-phone bank “tech support office hours” event to support volunteers** who have questions about getting set up on your phone bank software and video conferencing system.
- ❑ **Review the [sample agenda](#) for a remote phone bank** below and customize it for your event. Share your version with anyone helping out during your event.
- ❑ **Acquaint yourself with Swing Left’s [Super State Strategy](#)** as well as information about the specific [Super State](#) whose voters you are calling.
- ❑ **Write up the agenda and event goals** on a slide or document to share at the beginning of your virtual party. You can make a copy of the [Sample Slides for Virtual Phone Bank Welcome, Introductions, and Training](#) and adapt if you'd like.

Virtual Hosting Tips

Virtual events can be just as effective as in-person events, but you might need to adjust a few aspects of your remote phone bank training and debrief. Here's some ideas how:

- ❑ **Be inclusive and connect with guests even though you are online.** Some volunteers can be more hesitant to speak up online. As you begin the remote phone bank, welcome volunteers and, depending on the size of your group, consider having everyone introduce themselves *briefly*. Check out the [agenda](#) for more ideas for icebreakers.
- ❑ **Make it easy for volunteers to get phone banking help/support.** Depending on how you set up your phone bank, this might mean setting up a specific support video conference meeting or staying on your video conference throughout the time volunteers are making calls.
- ❑ **Help volunteers feel comfortable with the video conferencing tools so they can fully participate.** New technology can be daunting. You might offer pre-party tech

“office hours” to help people get up and running on your video conference tool of choice. You can also let volunteers know that you’ll start the phone bank 15 minutes early and give a tutorial on the tool. Potentially identify someone who is tech savvy to provide technical support throughout the phone bank

- ❑ **Delegate tasks to other people so you aren’t the only person talking.** Give people roles so that you’re not the only one doing all the talking. If you have veteran phone bank leaders at your party, they can help you present the agenda portion of the event.
- ❑ **Be positive and constructive.** Keep the tone upbeat - this is an exciting and participatory event!
- ❑ **Get creative with making the orientation and debrief fun and engaging.** Here are ideas on how to engage others even while you are virtual:
 - ❑ Ask volunteers to make a commitment to a certain number of phone calls during the orientation - for example 25-50 calls for new phone bankers, 50 - 75 for veteran phone bankers, and 75 - 100 for phone bank leaders.
 - ❑ If your video conferencing allows [break-outs rooms](#), you can use breakout rooms to give volunteers a chance to meet in small groups and give feedback on making calls.
 - ❑ You can encourage volunteers to join your video conference during breaks every {X} minutes or whenever volunteers need it. Make yourself and other super volunteers available for chatting and engagement.
 - ❑ Themes, costumes, and decorations are all welcome additions to your phone bank - every day is some sort of holiday ([and you can find out which holiday here](#)).
- ❑ **Show everyone what Swing Left's movement looks like!** Share a group pic, video or anecdote from your event on Twitter, Instagram, or Facebook (or all three!) Using the hashtag and @ below will help Swing Left retweet/repost! *Important note: since you are calling private citizens and using proprietary scripts, please make sure to obscure or cover names, emails, and scripts in your photos.*
 - ❑ Use the hashtag [#swingleft2020](#)
 - ❑ Tag Swing Left with [@swingleft](#)
- ❑ **At the end of the event, make sure to ask volunteers to sign up for another shift/event.** Identify your ask before the event.

Following Up Immediately After the Event

- ❑ **Close out your event by updating who attended and who didn’t in Mobilize.** Check out the [Mobilize guide](#) to learn how to manage your attendees. This process helps us

track how many people came to events across the country and will allow you to follow up after the party.

- ❑ **Send a thank you and follow-up email** to all attendees after the event. Let your volunteers know:
 - ❑ They'll receive a follow-up survey from Swing Left and Mobilize and you are interested in their feedback.
 - ❑ They should sign up for a next event(s): {provide a link to that event!}.

Detailed Sample Phone Bank Orientation and Debrief Agenda for Hosts

This agenda will walk you through launching your video call, welcoming phone bankers, training phone bankers on your phone bank, supporting phone bankers while they make calls, and wrapping up so that attendees keep coming back for more!

(These are sample times—feel free to adapt to what works for your event.)

Pre-Phone Bank Video Conference Support (Optional) + Gathering (~15 minutes before the phone bank)

- Jump on early to help anyone who is new to video conferencing and may need some help to learn how to turn on their webcam and mute and unmute.
- As people join, welcome them and let them know the time you'll start the party. If your video conference option offers chat, ask people to introduce themselves on the chat as they are joining.

Introductions (~5 minutes) (don't skip this - it's a great way to build community)

Resources and Materials: Sample Welcome and Training Presentation

- Start by introducing yourself and your motivation for hosting the event. Then briefly review the agenda. You can share slides to walk through each agenda item if that works for you or just do it verbally!
- Spend some time orienting attendees briefly on how to use the video conferencing tool you are using so they know how to mute, ask questions, turn on their video, etc.
- Go around the "virtual room" and ask everyone to briefly introduce themselves. If it's a really big group, you can break up the introductions into "breakout rooms" if your video

conference tool allows that. As they are introducing themselves, write down who showed up. Here are suggested icebreaker questions:

- What motivated you to come today and get involved?
- How are you feeling about 2020 and the work you're going to do?
- Have you worked or volunteered in past elections? What was that like?

Swing Left 2020 Strategy Overview (~5 minutes) (Optional)

Resources and Materials: Sample Welcome and Training Presentation, Swing Left's 2020 Super State Strategy, Swing Left's Super State pages

- If your volunteers are new to Swing Left, you can take a few minutes to help them understand why they are doing this work by describing the Swing Left Super State Strategy.
- Explain to your guests how this phone bank campaign supports the Super State Strategy.

Train on Phone Banking, Software, and Script (~15 - 20 minutes)

Resources and Materials: Phone Banking Best Practices, Phone Bank Software and Script, Volunteer Instructions Document

- Talk through how volunteers can get up and running on the phone bank technology. You can use slides or demonstrate live by sharing your screen.
- Orient volunteers to the script by walking through the script and potentially role playing with another volunteer.
- Walk through recording call data and make sure it's clear how volunteers record and code their data.
- Train volunteers on phone banking best practices and how to effectively talk to voters.
- Let volunteers know how they can get access to the volunteer instructions document you created and also how they can get help and support while making calls if they encounter a problem. Also remind volunteers when and how to gather after making calls.
- Let your volunteers know they can go make calls!

Make Phone Calls (time varies)

- Depending on how you set up your phone bank structure, you might stay on your video conference while volunteers make calls (fixed phone bank) or offer help/support sessions intermittently while volunteers make calls (flexible phone bank).

Closing/Debrief (~10 - 20 minutes)

- Whether you meet for a debrief at the end of the phone bank session or at a later date, lead your volunteers in a debrief.

- How did it feel to make calls?
- What worked/ didn't work about the script?
- How did they adapt the script to make it work for them?
- If you are able to announce total calls made and contact rate during the phone bank (anything above 10% is normal and above 20% is fantastic), this can help volunteers feel a sense of accomplishment and motivate them to make more calls.
- Encourage your attendees to sign up to make more calls or host their own phone bank. They can post their [remote phone bank events here](#).
- Thank everyone for coming and remind them of the overall goal: *stop Trump and his allies once and for all!*

Remote Phone Bank Resources

- [Set up your Remote Phone Bank event here](#)
- [Remote Phone Bank Host Training Recording](#)
- [Mobilize Virtual Event Tips & Tricks](#)
- [Example NGPVAN Virtual Phone Bank \(VPB\) volunteers instructions](#)
- [Example List Fixer Instructions & Resources for Volunteers and Hosts](#)
- [How to Code Phone Bank Data](#)
- [Phone Banking Best Practices](#)
- [Guide about Resources for Video Conferencing](#)
- [Swing Left 2020 Super State Strategy](#)
- [Event recruitment and promotion guide](#)