Setting up remote phone banks

As people practice social distancing and teams pause door canvassing, you can continue to connect with your communities through home phone banking. We know that organizing phone banks for volunteers calling from home can be tricky, especially when team members are new to phoning. We’re sending you these guides and videos to help your team to reach out to your communities in these difficult times.

You might be checking up on volunteers, members and donors or reaching out to constituents to inform them of community resources or just to check on them. These guides will help your teams get volunteers on Virtual Phone Banks (VPBs) from their homes. They’ll also help you to improve your team’s results over time.

1. Start by determining the goal(s) of the project. Are you checking in on past volunteers to provide a social check in? Are you reaching out to Liberal seniors to ensure they have access to information on where to get help if they need it? Are you making sure that members of your community have the information they need on available government assistance? And giving them the opportunity to provide feedback on government programs? Decide this early, as it will determine many other aspects of your phone bank, from the way you describe the project to volunteers to the way you set up your script.
2. Start off by sending an email to your team members inviting them to take part in this great outreach event (from their homes)!
   * Let your volunteers know when these calls will be taking place, provide them with all the guides and resources they need to make calls, and make this an enjoyable, community team building experience that you can do “together”, although separate.
   * Ask volunteers to confirm whether they will be helping out so that you can set up Liberalist accounts beforehand and so that you know who to contact with the VPB on the day of the event.
3. Call or text your volunteers before the event
   * Call people who didn’t respond to the email. They might have missed it!
   * Call confirmed volunteers to ensure they have what they need to make calls
     1. A computer with a good internet connection
     2. A way to communicate with the people they’re calling, either by using a phone or with their computer (if it has speakers and a microphone).
4. Create the script that will guide your volunteers’ conversations.
   * Set your goals for the phone bank and write your script to achieve those goals. For example, if your goal is to check in with Registered Liberals over 50, add a question to your script to record how they’re feeling (otherwise, your volunteers won’t have anything to tag and the system won’t know who’s been called). If you’re reaching out to check in, make sure you add the names, phone numbers and links for groups who are helping community members who are struggling during this difficult time.   
     Note: You can find more information on creating scripts here: [Create a Script](https://docs.google.com/document/d/1c_flCeEG8LfRC18l0uRMnnwFR_I9d5XOhYP3tjlHmwM/edit?usp=sharing)
   * Remember that your script will be available to a large group of people who may choose to share it more widely. Please make sure that the script is not easily interpreted as rude or out of keeping with our party’s values. These calls are about connecting with your community, not gaining a political advantage. The script should reflect that.
   * Your script should help your volunteers to talk to people in a way that fits this tough moment we’re facing globally. Don’t forget to add opportunities to express empathy and comfort.
   * Your script should give opportunities for people to share their concerns, but do **make sure you avoid stating or implying that your team will provide tangible and immediate help** unless you’re ready to provide it. You don’t want to risk disappointing someone who believes some type of assistance, be it groceries or regular social engagement, is on its way.
   * We recommend adding the Volunteer Status survey question to the script, even if it’s just at the bottom for data recording purposes and not part of what you’re asking volunteers to say. Some of the people you call may appreciate the outreach so much that they want to join your team.
   * Check out our guide here on [how to create a script.](https://docs.google.com/document/d/1c_flCeEG8LfRC18l0uRMnnwFR_I9d5XOhYP3tjlHmwM/edit?usp=sharing)
5. Create the virtual phone bank
   * Take a look at our guide here on how to set up the VPB. [Setting up a VPB](https://docs.google.com/document/d/16O7yjCANBMNY3I4kskjiABCaM8uccav_TqA9xQ_kJqI/edit?usp=sharing)
   * Give the phone bank a clear name and share it with the people you know will be making calls.
6. Setting up your VPB callers remotely
   * Send an email with the details of the VPB.
     1. Include links to resources users can use to learn how to log in. Let them know when they should start calling, what the VPB code is and provide any instructions.
        1. [Logging in](https://docs.google.com/document/d/16O7yjCANBMNY3I4kskjiABCaM8uccav_TqA9xQ_kJqI/edit?usp=sharing)
        2. [Connecting to a Virtual Phone Bank](https://docs.google.com/document/d/19NCskrxkeSMNf5xtUdmZ2V5W0M2m4KDnrfe2nMaa9SY/edit?usp=sharing)
     2. Provide the script in advance and encourage them to practice it.
     3. Provide a phone number for the coordinator in case they have questions before, during or after phoning.
     4. Depending on their level of comfort with technology, your team might benefit from being a part of a group chat dedicated to home phone bank coordination, motivation, and best practices. It helps you to let people know when they can start phoning, issues that are coming up during phoning, and any changes to the project as you go. It’s also a fantastic way to share positive feedback throughout the phone bank.
7. Troubleshooting a remote VPB
   * It’s normal for volunteers to have questions or concerns during the VPB, especially in your first few phone banks. It’s especially common for people to ask whether the list is correct or to report that they made an error and need your help to fix it. Whatever the case may be, we always want to make sure that your fantastic callers feel like they are being supported.
     1. Provide your callers with a phone number to call or text in case they run into any issues.   
        Note: If you are using a group chat to coordinate and motivate volunteers, ask your volunteers not to use it to report concerns or issues. It distracts the other callers from their calls. They should contact the designate help person instead.
     2. Keep an eye on the VPB report throughout calling to see if there are high rates of hang ups, negative responses etc.
     3. Take a look at your guide on [monitoring a remote phone bank](https://docs.google.com/document/d/1BR_2e771XyhZI7ZSz6QRkbH5FDnUmt-vYgyyl1bSq5w/edit?usp=sharing) to ensure that you know all the best practices and things to look out for as the organizer.
8. Keep it fun!
   * In these times, we all need a little bit of fun and to feel like we are doing something that has meaning and purpose. Throughout the phone bank, send your volunteers words of encouragement and congratulate them as they reach various milestones in the phone bank.
   * At the end of the phone bank, send a note to everyone thanking them for their time and effort. Give them the total number of calls to exemplify the great work they are doing.
   * Finally, find a nice way to get your callers to share their experience and stories. Encourage them to talk about their favorite interaction of the night, or share a story that they thought was particularly special.