

# Comprehensive Immigration Reform Campaign

## *Days of Action and Phone Banks*

### Host Guide

#### Issue Background and Our Purpose

America's immigration system is broken. Too many employers game the system by hiring undocumented workers and there are 11 million people living in the shadows. Neither is good for the economy or the country.

It is time to act to fix the broken immigration system in a way that requires responsibility from everyone —both from the workers here illegally and those who hire them—and guarantees that everyone is playing by the same rules. With comprehensive immigration reform we will be able to strengthen our economy and strengthen our country's future.

A bipartisan committee in the Senate - the Gang of 8 – has introduced a bill for comprehensive immigration reform. It's important that we continue to move the ball forward and make sure our Members of Congress know that it needs to be one of their top priorities.

#### Qualitative Goals

1. Highlight the overwhelming support for comprehensive immigration reform
2. Make our representatives aware that their constituents are paying attention to this vote
3. Continue to build and grow OFA's grassroots community around the issue of comprehensive immigration reform

#### Quantitative Goals

It's important to be clear with phone bankers about the quantitative goals of your phone bank. Setting goals is one of the best ways to make the best use of our volunteers' time and have the greatest impact on this issue. We'll be measuring (and reporting up). Ask your state coordinator what your metric goals are and prepare accordingly.

1. Total Call Attempts (50 per caller)
2. Total Call Contacts (10 – 15 per caller)
3. Pledges to call their Senator (10 – 15 per caller)
4. Sign-ups for future events (3 – 5 per caller)

## Planning and Executing Events

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### General Event Guidelines

While every event has its own unique needs, depending on the type of action you will be conducting and the community in which you are conducting it, some general guidelines helpful to consider for every event are listed below.

### Location

Finding a location for your event is crucial. In these situations, an alternate location will have to be found. It is important that the location is comfortable, convenient, and gives your volunteer group room to grow. If possible, it is ideal to have phone lines for phone banking, internet access for meetings, and air conditioning for canvasses. But we can be creative with locations and sometimes convenience will outweigh other concerns. Here are some suggestions for places to look to host events

- Rooms in community centers, schools, libraries, etc.
- Private homes
- Coffee shops or book stores

When looking for your location, you should think about things like parking, access to public transportation, ADA accessibility, and the availability of restrooms.

### Digital Amplification



- We'll be asking people to pledge to call their member of Congress – use your social networks to make that ask as well.
- Take and tweet photos, quotes and any other memorable experiences from the day
- Sharing your event via social media is the only 100% way to guarantee coverage of your event.
- Make a plan of who will photograph your event.
- Check for other event specific hashtags, but you can always use: #OFAAction

### Pitching Event to Press

**FIRST:** Check with your state lead about whether your event is open to press. In most cases they are not, so make sure you're 100% sure before pitching your event to press.

A pitch call is an opportunity to talk directly to a news outlet to tell them about your event, why they should cover it, and get a concrete commitment for them to cover the event.

### Best Practices for Pitching to Press

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- Unless a reporter has told you otherwise, mornings are usually the best time to call a newsroom. Many reporters are working under deadlines in the afternoon and evenings.
- Be prepared for a brush-off. Some reporters and newsrooms will try to get off the phone quickly - ensure they have all the info before you get off the phone with them.
- Others will tell you to simply email them the details before you get a chance to make a pitch or an ask. Do your best to stay on the phone until you get all the details out there, even if it feels awkward. And give a follow up call after you send the information in an email.
- Think of your press pitch call as a volunteer call – you always have an “ask” to make, but you also need to give the reporter a reason to say yes.
- Wear your passion on your sleeve! Your excitement will make reporters excited to attend your event.
- Make your call personal – local reporters want to cover issues that affect their communities specifically. Why is your Congressman’s office important? Why is this issue so important to your community?
- Have strong follow up! Even if you’ve already spoken to a reporter and gotten a commitment to attend, follow up the morning of your event with another call to confirm their attendance.

### **-Sample Press Pitch-**

(Strictly a sample; tailor yours to your own event)

#### **Introduce yourself, OFA and the event**

Hi, is this the newsroom (political/community reporter, etc)? Great! My name is Allie Ebner, and I’m a volunteer with Organizing for Action. We’re a grassroots community group that’s working to support the enactment of (specific policy) of President Obama’s agenda. And tomorrow we are holding phone bank, at the corner of 1st and Main Street, at 1pm. Community members will be coming together to call their neighbors and encourage them to urge the Congressman to support comprehensive immigration reform. We sent you a press advisory yesterday – did you receive it?

#### **Explain why the event is worthy of media coverage**

Comprehensive immigration reform is an issue that our community cares very deeply about right now – we actually expect about 40 people to attend. Congressman Smith will be a key deciding vote on this issue, so it’s important that our community makes its voice heard. Mayor Brown and Assemblywoman Garcia will be speaking to everyone about this important issue.

#### **Make an ask**

Can I count on ABC 30 Action News to cover the rally?

#### **Wrap-Up**

Great! Let me confirm the details with you – it’s at 1pm, in front of Congressman Smith’s office, at the corner of 1<sup>st</sup> and Main Street. What’s the best email address for me to send you the press advisory?

#### **Keep track of who you call and their responses**

Just like volunteers calls, capturing the information of who you spoke with at what number and what email address they gave you to send to are invaluable pieces of information to use again in the

future. This way you can call someone directly who will have the best answers and make the most effective use of your time.

## Covering Your Event

### Designate photographers and tweeters

- You can 100% guarantee coverage of your event by planning on social media.
  - Your state's twitter account may be as large or larger than that of some media.
- Plan on designating a main photographer who has a good digital camera or is well skilled with mobile photography.
- Designate 2-3 people to cover the event from their point of view on twitter.
- Make sure your state's digital lead is aware of the event and planning coverage.

## Volunteers

The more people participate in your event, the more successful it will be. You can get every other detail right, but if no one shows up then your event is a flop. Your goal should be to recruit as many participants as possible, in most cases twice as many as you think you actually need. Here are some suggestions for ways to find volunteers:

- Call through a volunteer lists generated by MyCampaign
- Post your event to BarackObama.com
- Call through your personal contacts
- Post a flier at your community center, coffee shop, or school
- Leave fliers at meetings of other organizations that might be interested
- Email your local Organizing for Action team members
- Be sure to make reminder calls and send reminder emails to participants the day before the event. Turn out will increase dramatically if you ask them for a firm commitment. Be sure that all attendees are confirmed, reconfirmed, and reconfirmed again – e-mailing a reminder is not enough!

## Materials

The one thing an Organizer has at every event, no matter what, is a sign in sheet. Nothing is more important than building the list! The rest of your materials will be different depending on whether your event is a phonebank, press conference, LTE-writing party, or meeting. The most important thing to remember is to prepare all of your materials ahead of time, so that you are not rushing around at the last minute as your participants are arriving.

## Running Your Event

It is easy to be overwhelmed if your event is successful and there are many volunteers. Remember these basic steps for a successful event:

- Sign everyone in

- Explain your goals for the event and set expectations
- Walk through your materials carefully and role play if appropriate
- Celebrate progress throughout the event if it is an action event
- Take pictures to post to social networks
- Celebrate your work at the end of every event
- Don't let anyone leave without asking them to sign up for another event the following week

## Best Practices for Calling Senators

- Identify yourself. Make sure to mention you are a constituent. "My name is X and I am a constituent of Senator X, living in city/town."
- Identify purpose. "I am calling to urge Senator X to vote in support of SB 649 – the Safe Communities, Safe Schools Act of 2013. We need his/her support and leadership on this issue now!"
- Briefly explain why a yes vote is important. Either share a personal reason for your support or a statistic on why comprehensive immigration reform needs a vote now. "Comprehensive immigration reform is important to me because..."

## Data Entry

Getting data entered quickly and accurately is almost as important as the event itself. Remember, if it is not in the VAN it does not exist. Having a team or system in place to make sure that all event data is entered quickly following the event will be a necessary step for all event organizers.

## Follow Up

Every person who shows up and participates should get a thank you call afterwards. Volunteers need to know and hear that we appreciate and value their time and effort constantly. These calls are also valuable to firm up additional commitments for future shifts made at the event. Additionally, every event always has people who commit to coming, but then don't show up. For people in this situation, a friendly phone call that checks in, asks why they missed the event (but doesn't berate or preach), and gives the person another opportunity to come and help is incredibly valuable.

## Planning and Executing Phone Banks

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Phone banking is the most efficient way to talk with supporters about the issues that matter to them. While not as impactful as the face-to-face contact of outreach, it still allows volunteers to communicate directly with our targeted supporters. A phone call influences someone's likelihood to get involved when it meets the following criteria: (1) the supporter is strategically targeted; (2) the call is completed by a well-trained volunteer; (3) the volunteer is from the same community as the supporters they are speaking with. Phonebanking is a very flexible action. It works well in every turf type, with any experience level, and can be done from a variety of locations.

### Tips for Effective Phonebanking

The most effective phone banking happens when a group of volunteers get together to make phone calls to a common list. When groups of people make calls together, volunteers make more calls than they would alone. It is more fun to call with a group, and volunteers usually commit to volunteer again if they had a good time. They can work towards a common goal and build the relationships that make the OFA volunteer network strong.

### Some of the skills involved in good phone banking are common sense:

- Being friendly
- Being polite
- "Smiling through the phone"
- Being natural and neighborly
- Listening more than you talk
- Not reading directly from the script

### But some of the skills only come with practice:

- Being able to anticipate common questions and pushback and being able to respond well when they happen
- Being able to get firm commitments without losing the friendly tone
- Being able to talk about the issues in a way that is accessible to supporters
- Having a good opening line that keeps people on the phone. Example: Saying "I'm a volunteer with Organizing for Action" works great.
- Knowing what messaging works with what type of audience

### More Details to Consider

- Consider what it will be like in your potential location to have a group of people all talking on the phone at the same time- is it a public area where other people will be, and if so, will the phone bankers be a distraction to them? Will they be a distraction to the phone bankers?
- While landlines are ideal, most locations will not have them, or we may not legally be able to use them (for example, we cannot coordinate with the Democratic Party and cannot host events in their spaces). Ask your volunteers to bring their own cell phones to use.

- Make sure that your location has cell service before you book it. You will be surprised how many locations have spotty coverage.
- Some phonebankers are old pros. They may resist the role-play or long explanation of the script. Pair them up with the newest volunteer and empower them to be the trainer. This acknowledges their experience while ensuring that they will read any new material.
- Make sure that your volunteers know that the information that they are recording will be transferred into VAN. This helps them to understand why using the codes and writing neatly are better than long hand notes.
- Staple your call sheets into packets of 50 calls. People are much more likely to make all the calls!
- Tallying calls during the phonebank, or having ways for the volunteers to celebrate commitments as they get them will make the phonebank more fun.
- At the end, ask each volunteer to share a good and a challenging call. This allows you to coach and debrief the hard conversations while also celebrating the successful calls.
- Plan ahead for data entry. If your phonebank is large enough you can have one or two people doing data entry at the event, if you have them start an hour after the phonebank begins.

## Effective Phonebanking Pointers

### Do

- Introduce and identify yourself as a volunteer with Organizing for Action
- Be kind
- Be friendly
- Be polite
- Hard Ask
- Be persistent – know the 3 types of “NO” and don’t take any of them for an answer
- Engage in friendly conversation
- “Smile through the phone”
- Be natural and neighborly
- Listening more than you talk
- Be respectful of other points of view
- Finish your packet of calls: you alone are responsible for ensuring the supporters on your list are contacted to call their Senator
- Respect. Empower. Include. Act.

### Don’t

- Read directly from the script
- Be rude, short or condescending
- Speak negatively of other points of view
- Write chicken-scratch on your call sheets. Remember that someone else is going to go through and record the data from your calls, so they’ll need to be able to read it!
- Over-engage in lengthy policy debates
- Leave messages. We have a lot of calls to get through. Our data has shown it’s the best use of everyone’s time to hang up when you hear a voicemail.

## Checklist for Planning, Executing & Following-up Your Phonebank

	<i>Check</i>	<i>Description</i>	<i>Time Frame</i>
<b>Before</b>		Establish date and time for the phonebank	5-7 Days Out
		Confirm a comfortable, quiet, ADA accessible location with cell service and access to parking and/or public transit	5-7 Days Out
		Post event details on BarackObama.com	5-7 Days Out
		Call local volunteers identified in MyCampaign to invite them	2-5 Days Out
		Make confirmation calls to attendees to remind them to come	Day Before
		Send a reminder email to the local allied organizations & OFA team	Day Before
		Print scripts, call lists, tally sheets, and any other materials	Day Before
<b>During</b>		Sign in volunteers & thank them for coming	8 Mins
		Go over the basics of making calls	5 Mins
		Go over the script, survey codes and Phone Bank Dos/Don'ts	5 Mins
		Roleplay!	10 Mins
		Set a call goal so that all participants can work toward it together	2 Mins
		Make calls with the participants	2 Hours
		Coach each other on tough calls	2 Hours



		Celebrate successful calls together	2 Hours
		Take pictures, Tweet, & update Facebook with stories, quotes, fun	5 Mins
		Tally and celebrate progress	5 Mins
		Sign up all participants for the next event	10 Mins
		Thank everyone for coming	5 Mins
	<b>After</b>	Do a final tally and report totals to state coordinator	Day of Event
		Enter all data into the VAN	1-2 Days After
		Call people who were scheduled but did not attend	1 Day After
		Write a blog about the event	2 Days After
		Call participants to thank them and confirm for their next event	2-3 Days After