Setting up a Virtual Phone Bank (VPB) in VoteBuilder

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WHY USE VPB?

A Virtual Phone Bank (VPB) allows users with a computer/tablet and Internet connection to use VoteBuilder to make calls from a list and script you've created. Each user will be given one name to call at a time until everyone on the list has been attempted once. It's convenient, easy, and it takes away the hassle of data entry.

The very first step in setting up a phone banking campaign is *the* most important:

STEP 1: **Decide WHO ARE YOU CALLING** (the Audience or the "Universe"),
and **WHY YOU ARE CALLING THEM** (the Ask). This will help you focus and make decisions.

THE "AUDIENCE"	THE "ASK"
Example: Democrats in my precinct who voted in the 2018 Democratic Primary	Invite to event/volunteer opportunity, update contact info, asking if they will volunteer
Example: Democratic voters in my precinct who registered in the past year who did not vote in 2018 Election	Welcome them to the area, let them know about an upcoming election, offer guidance/reminders through the election process
Example: D and U voters in my precinct age 70+ who voted D in 1 of 2 previous primaries	Ask if they want an absentee ballot request form sent to their house or a ride to the polls

STEP 2: Next, create or select a previous script for your calling campaign.

There are many existing scripts in our Mecklenburg list from previous campaigns. You may want to look at a few to see how they're put together and what they include. Choose Main Menu > Admin. Menu > Codes • Questions • Scripts > **Scripts** for the list. Then click **Add New Script** (button, top right).

A **Script** is built from three kinds of "blocks" – **Text**, **Survey Question**, and **Activist Codes**. To add a block of Text to the script that the canvasser will read, type it in the box and click "Add." To include a Survey Question from the list already in VoteBuilder, choose one and click "Add." *Note: Mecklenburg users cannot currently CREATE brand new Survey Questions but we have requested this ability.*

As you add blocks, you can drag them up and down to rearrange their order using the ☰ icons.
Be sure to click "Save" under all the blocks or at top right when you're done.

Example: Adding a Survey Question

> **Why Use Survey Questions?** Adding a Survey Question will allow you (and other organizers) to search for voters who answered those questions a certain way – for example, voters who said "Education" was their top issue, or voters who said they would support Democrats in 2020.

STEP 3: Create or load a List or "universe" of people to call.
(We have covered how to create a List in previous VoteBuilder training and will not repeat it here.)


TWO IMPORTANT SETTINGS TO INCLUDE WHEN MAKING YOUR CALL LIST:
- Under "Household Sex Counts," enter "1 to 3 people." This eliminates nursing or group homes.

- Under "Phones" – Choose the following types: Cell – Home – Main – Other. This eliminates people from your call list who don't have phones listed.

Once you have your List ready, and narrowed to the number and criteria to include, click on Calls.

Choose • **Set Up Virtual Phone Bank List.**

On the next popup, it's usually best to choose **"Use Static List."** This will keep the list from updating if more people are added to the database while the phone bank is going on, which could be confusing for those tracking progress.
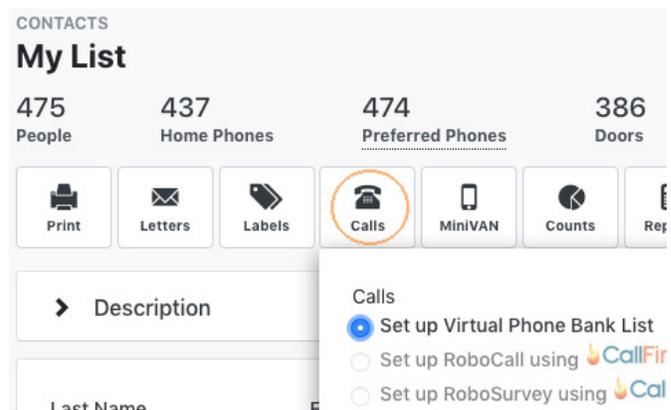
STEP 4: Enter all of the settings for your phone bank.

- Give your VPB a **Name** – users will see this name so make it a brief, good descriptor.
  E.g. PCT 226 2019 Volunteer Recruitment -OR- PCT 226 GOTV Newly Registered Voters.
  Entering a Description is optional.
- Select a **Script** – you should see the one you just wrote and saved in the list.
- Enter **Start and End Dates**. After this date your VPB will be done and users can't call.
- Under the **Sharing** tab you have two options for openvpb.com.
  - If you **Publish to openvpb.com** this allows users who don't have VAN accounts to make calls – anyone with the link and an ActionID can access it. (less secure)
  - If you **Don't share to openvpb** you can send the VPB code to people with ActionIDs or VoteBuilder accounts and they can use it (more secure)
- Don't use **Event Scheduler** unless you *already* know how to use it.
- Under **Additional Settings,** some settings have (?) bubbles that will give you more info if you mouse over them.
- In **Daily Availability**, set hours between which users can call (ex.: 9am-8pm). Contact Limit sets the max # of attempts or contacts any given phone banker can do (ex: 120). Distribute voters by zip code would first go through voters in the caller's own zip code.
- **Householding** is up to you. You can have NO other voters at that address (household) displayed to the caller; or only other household people who meet your List criteria (good idea because it keeps households from being called twice), or ALL other voters in the household. The caller can toggle between people in the household via tabs with the voters' names while they're calling.
- We recommend **Attempting alternate numbers**. This lets the callers try all listed numbers and strike bad ones.
- We recommend **Allowing users to skip**. This means if they run across a name or house they don't want to call, they can move past it.
- **Excluding Early/Absentee/Election voters** is useful during GOTV so you don't bother those who have already cast their votes!

> **Share With Care:** User Group Access gives specific VB users permission to join *AND EDIT* your Phone Bank settings. So only add those you trust to not mess up your settings! You'll invite people to make calls by sending them the VPB Code and/or OpenVPB link at the top right of the screen instead.

We recommend you copy and paste the VBP code and/or OpenVPB code into another document before leaving this screen. This way, you have it handy.

Once you've saved all of your settings (blue button near top right of screen), if you need to get back to this screen with the settings and codes again, you'll go to Main Menu or Home and click on **"Virtual Phone Bank List"** (this shows you a dashboard of your phone banks) and click on the name of the Phone Bank. *There's a screenshot of this on the next page.*

Phone Banks
Create New | Join a Phone Bank | View All

15
Total Calls

Assigned to Me

☎ 9th Absentee Search — 10%

☎ PCT 226 June 2019 Cookout Ask — 1%

STEP 5: Test out your phone bank.

Go to your Main Menu OR Home Screen. Look for the **Phone Banks** box.
You should see the name of your VPB under **"Assigned to Me."** Clicking on the name will bring up the VPB and you should see the very first record to call.

Go ahead and make a call! You'll use your own phone — calls will not go through the computer. Remember, callers with Caller ID WILL SEE your phone number and possibly your name. If you're not comfortable with this, arrange to make calls from Meck Dem HQ. *Note:* If you try to make calls outside of the calling hours you set up, it won't work!

If you need to tweak the VPB's settings, revisit the Main Menu or Home and look in the menu on the LEFT side of the screen. Click on **"Virtual Phone Bank List"** (this shows you a dashboard of your phone banks) and click on the name of the Phone Bank to edit the VPB settings.

If you need to make a change to the **Script**, that's in a different place. Go to Main Menu > Administrative Menu > Codes • Questions • Scripts and click on **Scripts**. Find your script in the list and click on it to edit. Don't forget to click "Save" after making edits.

STEP 6: Give the codes to your phone bank callers.

If you used **Publish to openvpb.com** send them the **OpenVPB link** at the top of the VPB Phone Bank settings screen (see instructions above on how to find it). The link is at the right of the screen for you to copy and paste.
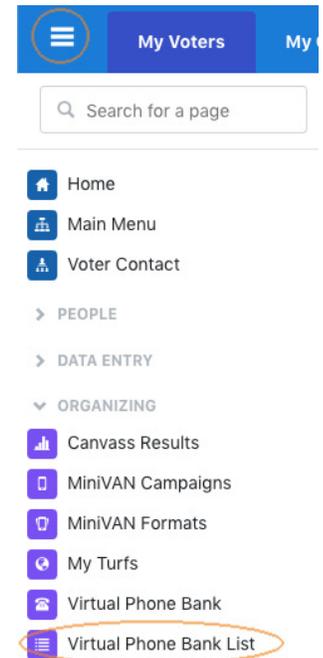
From the link, users will log in with their ActionID or click the link to create an ActionID if they don't have one. If they need help, direct them to support@meckdem.org.

You can text someone the link and they can click it and log in with an ActionID from their phone. They'll see the info on their screen and can make calls using speakerphone or headset.

If you didn't share to OpenVPB, copy and paste the **VPB Code** and send it to people who have VoteBuilder access. Instruct them to log in to VoteBuilder and click on "**Join a Phone Bank**" in the Phone Banks box on their homepage *(it's the same menu pictured at top right of this page).* They'll need to use a phone to type in the phone numbers and make the calls.

STEP 7: Check the progress of your canvassers.
From **Virtual Phone Bank List** menu (pictured above right) you will see all VPBs you have access to.

You'll see statistics there. Clicking on **Report** (far right of VBP stats, under ⌄ will show you a breakdown of progress by user. If your callers get through all the #s, "Refresh and Send to next Round" will reload the VPB with successfully canvassed voters removed. You can do this multiple times.

• **Remember to check in with your volunteers. Give them updates, thanks, and encouragement!**