



Swing Left Phonebanks: A Host Guide

Thank you for hosting a phonebank for Swing Left!

Whether you are a veteran phonebanker, or have never made a call for the cause, phonebanks are a great way to engage with voters ahead of the 2018 midterm elections. They are also a great way to get volunteers involved in your local Swing Left volunteer group! Creating real connections and community is the most important step in building a movement, so take the time at your house party to get to know each other.

We'll be calling voters who we think are Democrats, verifying they are still Democrats, and asking them to pledge to vote in the upcoming congressional elections. As we saw in November 2017, particularly in Virginia, Democrats can win when we organize, mobilize, and turn out - these calls are a crucial step in taking back the 24 seats we need to flip the House!

Volunteers will dial their own phones to make calls using a Virtual Phone Bank (VPB) with our online phone bank system, called CallHub. Volunteers will need both a phone and a computer or tablet in order to make calls. The campaign will update the list of voters in CallHub regularly, based on how many calls have been made and how many voters remain to be called in the call universe.

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Phone Bank Checklist

- Set up your caller's CallHub agent IDs (see instructions, below)**
- A phone (cell phone, landline or VOIP system)
- A desktop, laptop, or tablet/iPad computer with either Chrome, Firefox, or Safari
- A steady internet connection
- Chargers and power strips are not required, but highly recommended
- Earbuds or headphones (if you are using a cell phone) are also not required, but highly recommended
- Print documents for your event:
 - [Sign-in sheet](#)
 - [Sign-up sheet for next event](#)
 - District Primer for the district you'll be calling - you can find the District Primers at swingleft.org/district-resources
 - [CallHub User Guide](#) - you may print just one or two copies and let people share
 - [Phonebank scripts](#) - a shorter, streamlined version of the script will appear in CallHub, but it can help to have some printed, longer versions with more prompts to talk through together
 - [Phonebanking Tips & Tricks](#)
- Pens
- Name tags
- Chairs and tables/trays for callers
- Wifi password - print out or write up cards or papers with your wifi password for your guests.

CallHub Agent IDs

One thing that makes phone banking with CallHub different than voter contact Swing Left has done in the past is that you'll need an "Agent ID" to make calls with CallHub. An Agent ID is just a CallHub username, and you can get one from Swing Left's phone bank portal. Each volunteer who makes phone calls will need their own CallHub Agent ID. When you go to www.swingleft.org/phonebank you'll be asked to sign in with your email address. From there you will be directed to set up an Agent ID with CallHub. For detailed instructions on creating your Agent ID, visit [CallHub User Guide](#).

- **Pro Tip:** When you sign up for your Agent ID, your confirmation email from CallHub might go to your “junk” email folder or your “promotions” tab. If the confirmation email does not appear in your inbox, make sure you check all of your email folders.
- **Pro-Tip:** Setting up a CallHub Agent ID is easy, but it can take some time. Therefore, we strongly recommend that phone bank guests set up their CallHub Agent IDs before the phone bank, and bring their Agent ID and password information with them to the event.

Inviting People to Your Event

Phone banks are great, because they let us talk to voters in swing districts even if we can’t physically travel to them because of distance or weather. That’s a great selling point when you invite guests. Just like any event, recruitment starts with simply inviting a few of your friends and asking them to invite some of theirs. You will be surprised how quickly you can fill a room.

1. **Write a list of all your friends, family, neighbors and colleagues** you want to invite.
 - Don’t limit your list to people who you think are involved in politics. This is great opportunity to invite new people into activism, and lots of people are getting involved right now for their first time.
 - About half of the people who say ‘yes’ will actually show up, so invite a few more people than you think you have room for.
2. **Spread the word digitally using [Action Network](#):** this the online event tool we use to coordinate our events. It has a number of useful recruitment features built into it. To check them out, log into your [Action Network dashboard](#), scroll down to Actions, and click Manage next to your House Party. Once you’re in you’ll see two helpful features:
 - Email: Sample text that you can use to email your friends (“Email a friend”). This includes an RSVP link to your specific event.
 - Facebook: A “Like on Facebook” option. This will allow you to post your event to Facebook, which can be a good way to get the word out as well. All that said, don’t rely on Facebook alone. Personal emails and phone calls will be more effective.
4. **Pick up the phone.** The most effective way to recruit is by sending an email (see the sample you can send in Action Network) and then following up with a quick phone call. And, the more methods you use, the better. So text, call, email, and knock on your neighbors’ doors to invite them all.
5. **Use Social Media.** Post the event in your local **Swing Left Facebook group**, or on **Twitter**. Additionally, posting events on the grassroots event calendar **Meetup.com** can yield new volunteers who are interested in making a difference.

If you have questions about how to use Action Network, check out our [Action Network User Guide](#).

Communicating with Your Guests

There are a few ways that you can communicate with your guests before the event. Action Network automatically sends a detailed reminder email the day before your event to all

attendees. In addition, if you change the event's location, date, or time, Action Network will email all attendees to let them know the new details.

Here are some other features you can use in Action Network to reach out to your guests:

1. **Post on the Action Network Discussion Board.** Anything you post on this board will be emailed to everyone who is signed up to attend your event. You can find it by clicking on the "Discussion" tab of your event management page.
2. **Download your guest list from Action Network and send a personal email.** This is a great way to re-confirm the "yesses" on your guest list. Those personal confirmations reduce the number of "no shows" on the day of your event. To use this feature, click on the "Download RSVPs" button under "Manage Event" - you'll see this when right when you log into Action Network, When you click "Download RSVP", Action Network will email you a comma-delimited (.csv) file or Excel file containing a list of all the registered guests.

Note About Bringing Guests and Your RSVP count

If you have Action Network email you your RSVP list, you may see one row in the downloaded file with one person's contact info and an indication that they said they'd bring 2 guests. Action Network counts that as 3 RSVPs against the cap you set for your event. If you have more guests than your RSVP limit that's likely because the last person to sign up for your event said they'd bring some guests. So, if they said they'd bring 3 guests, you'd end up at 3 over your limit.

Getting Ready for Your Party

Review the agenda below and share it with anyone helping run the party.

Review the checklist of materials, above.

Prepare and arrange your space to allow enough chairs and work area for your callers. Think about creating some "desk" areas using tables or T.V. trays, with enough space in between for people to make calls without talking right into each other's ears.

Gather materials and arrange for your guests, including your Sign In sheet, Sign Up sheet, scripts, pens, name tags.

Ensure wifi is working, charge your laptop, tablet/iPad, or computer, and bring it to the phone bank.

Set up snacks and water. Buy or make snacks and beverages if you'd like to provide some (although it's not required). Feel free to ask your attendees to bring a snack to share.

RSVP for a Host Training Webinar: Take a look at the [upcoming phone bank webinars we're hosting](#), and RSVP for a training that's convenient for you. We'll post recordings of previous trainings as they become available. New trainings may be added as new phone banks are organized.

Detailed Phone Bank Agenda for Hosts

These are example times for a 2.5 hour event. Please edit based on the schedule for your phone bank.

- 6:00 pm **Introductions**
- Give people time at the start of the phone bank to mingle and meet each other.
 - Welcome and thank the group for coming.
 - If you have a small enough group, spend 10 minutes going around the room to make brief introductions: *What strengths do you bring to doing this work? What is motivating you to do this work right now?*
- 6:15 pm **Overview and Training**
- Briefly review the plan for the phone bank, introduce yourself and your own motivation for having the phone bank.
 - Make sure everyone has set up a CallHub Agent ID (see above)
 - Review the [Phonebanking Tips & Tricks](#) and [phonebank script](#) so volunteers have an idea of what to expect
 - Using the script, spend 5 - 10 minutes role-playing a conversation with a fellow volunteer.
 - Review how to enter the data into CallHub
- 6:30 pm **Action**
- Set up for phone banking
 - Each volunteer should have set up their computer or tablet and go to www.swingleft.org/phonebank
 - Make sure that everyone has the correct phone bank link up on their computer by asking them to refresh the page before they click “Log in here to make calls”. That link will take them to the Virtual Phone Bank.
 - Review the [CallHub Guide](#)
 - Time to hit the phones!
 - Take a few short breaks to recharge as a group
 - Do something fun to celebrate good calls (e.g. have volunteers ring a bell when they get a vote pledge! Or yell “Bingo!”)
- 8:00pm **Closing**
- Review next steps:
 - When are we all going to get together again? When would be a good time to schedule an activity in our district?
 - Do a quick closing:
 - Ask each person to name one person they are going to invite to join the movement and one hope for 2018 (in one sentence).

Take Photos & Share on Social Media

Show everyone what Swing Left's movement to take back the House looks like! Share a group pic, video, or anecdote from your party on Twitter, Instagram, or Facebook (or all three!). Don't forget to include #swingleft and #takebackthehouse, so that Swing Left can retweet/repost!

Hosting Tips

- **Be inclusive and connect with guests.** Talk to each person when they arrive, sign them in. Introduce people to each other and genuinely get to know people by asking a few questions.
- **Delegate tasks to other people.** Give people roles so that you're not the only one doing all the talking. Ask someone to lead the calendar creation section or to help review next steps.
- **Stay on schedule.** Start on time and follow your party agenda. It's fine to keep questions and answers short so that you keep moving and don't keep people too late.
- **Get specific commitments** for upcoming activities. Don't be afraid to ask for a lot.
- **Be positive and constructive.** Keep the tone upbeat—this is an exciting, fun, and interactive event!

Editing Your Event on Action Network

You can easily change your event location, time, RSVP count or any of the other characteristics by clicking on the “edit event” button on the top of your event management page. All of your guests will automatically be emailed if there are changes to your event.

If you'd like to allow folks you don't know (yet) to sign up for your event, but want a bit more privacy, you can only list your street and zip code in the event details (Main St vs 123 Main St). You can then give your precise address to people who RSVP by posting it to the discussion board a day or two before your event OR by listing it in your “Instructions for Attendees” page (second page when you're setting up your event).

Note: If you choose to make your event private, only people who get directly sent the link to your event will be able to find it (tip: you should also remove the social media sharing sidebar if you don't want that link traveling around too much). This also means that other Swing Left volunteers in your community won't be able to find or sign up for your event.

You can make all of these changes by editing your event. If you have questions, check out our [Action Network User Guide](#)

Frequently Asked Questions

Q. Who are we calling?

- A. We are calling lists of voters we are pretty sure are democrats and asking them to pledge to vote in the 2018 midterm elections. In districts that don't have partisan voter registration, we are using data from a company called TargetSmart to identify likely Democrats.**

Q. How many calls should I make?

A. It's up to you! A typical volunteer will make about 20 calls in an hour, so if you're making calls for an hour, 20 is a good goal; if you're calling for 2 hours, 40 is a good goal, etc.