



Phone Bank Training

Sarasota County Democratic Party - Training Committee

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September 11 and 14 2021

Agenda & Intent

- Why We Phone Bank?
- Who Do We Call When We Phone Bank?
- How Do we Phone Bank in Sarasota County?
- What Support Can You Expect as a Phone Bank Volunteer?
- Privacy
- Phone Bank Screen Shot
- Role Play
- Questions and Answers

Disclaimer

- We are a volunteer army
- There is no 'right way' or 'wrong way' to make calls – just be **courteous**
- You cannot be expected to know everything about a campaign, about vote by mail, about Early Voting, about the new voter laws in Florida
- As a phone bank volunteer please do not be fearful that you will 'mess up'
- So LIGHTEN UP and pat yourself on the back for making calls



Phone Banks by Sarasota County DEMS

- Mature phone bank culture in our county with several state awards
- For Joe Biden and down-ballot candidates in the fall of 2020:
 - ~167,000 calls from August to November 2020
 - Top county in the state for making calls for Biden
 - 800 volunteers making calls (500 in-county & 300 out-of-state)
- For Alice White in Spring of 2021:
 - ~15,000 calls
 - Called from early January until March 2021
 - 50 volunteers (all in-county)
- Next Up: Sandy Sibley and other DEMS for Venice City Council and **2022 Midterms - Governor/Senator in Florida**



Why Do We Phone Bank?

- Accepted and proven part of campaign strategy
- Works for areas where we cannot access voters (gated communities)
- Many will not answer their doors
- Hard to get people to knock doors
- Can “touch” a voter multiple times during a campaign

Who Do We Call?

- We call Democrats and ask them to **take action**
- We call Non-Party-Affiliates who we believe lean left and we ask them to **take action**
 - The scoring for NPAs to ascertain if they lean left is an algorithm
 - Educated guesses about left leaners are not always correct
 - You WILL talk to a Trumper; Just be polite, hang up, and shake it off
- At the county party level, we do NOT knowingly call Republicans

How Do We Phone Bank?



1. In-Person Phone Banks at HQ

- Equipment provided by SCDP
- Face-to-face training with ability to 'hear and watch' someone else phone bank
 - Advantages: Camaraderie/Better Training Experience/FUN/Social/Food
 - Disadvantages: Fewer calls/Less convenient for volunteer

2. Virtual Phone Banks

- Use your own equipment
- Receive all training virtually
 - Advantages: Call anytime so increases call volume/More convenient
 - Disadvantages: Not social/Less Fun/No Catering/Less Camaraderie

How Does This Work?

- Volunteer signs up for shift on Mobilize
- Receive a 'welcome email' from us containing link to the virtual phone bank – OR –
- You are told to report to HQ on a certain day/time for your phone bank shift where you use an HQ device and click on the link to enter the phone bank
- You make calls!
 - All the pertinent information on the voter you are calling is displayed
 - The script is displayed
 - You enter data (mostly Yes or No) about the voter's responses to our questions
 - You click "Next Call" and move on

Support Structure for Phone Banks



- Data Team
 - Creates the lists of voters to call and the Virtual Phone Bank (VPB)
 - Response time in minutes
- Help Desk
 - Available for any volunteer with 'show me' concerns or questions about candidates or campaigns or voting or any other issues
 - Response time in minutes

Support Structure for Phone Banks, cont'd.

- Technical Support
 - Available for any volunteer with Sign-On or Access issues
 - Response times in minutes
- Voter Protection Services
 - Staffed by local attorneys
 - Response times in minutes or hours
- Daily Email
 - Link to today's Virtual Phone Bank
 - Updated facts about the candidate or the campaign
 - **Talking Points about the candidate(s)**
 - Today's Tips and Tricks

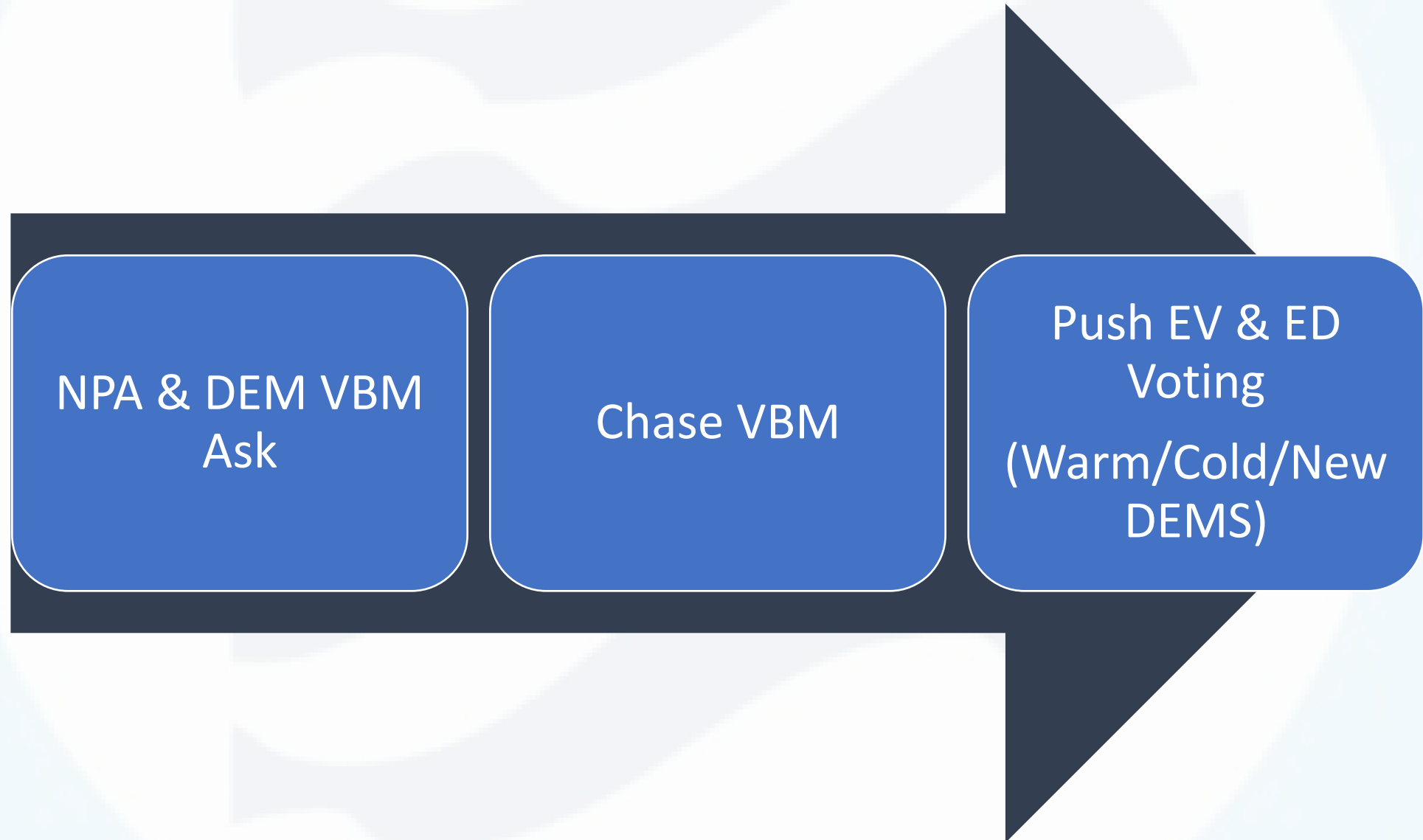
You Are Not Alone!

- Keep a writing pad and pen with you when you make calls
- If you do not know the answer – take their contact info and we/you can call back:
 - “I lost my Vote by Mail can I get another? Can you get me another?”
 - “My nephew just moved in with me can he vote? He’s not registered.”
 - “I never mailed my Vote by Mail and now it’s too late what are my options?”
 - “How does candidate xxx feel about the xxx issue?”
 - “My husband was informed his Vote by Mail needs cured! What should we do?”

Huge Issue: PRIVACY

- We used to use our own phones to make calls
- Now use integrated, computer assisted dialing “VPB Connect”
 - Your identity is masked
 - You use your laptop/tablet/smart phone and the application
 - You press the ‘call’ button on the screen and talk via your computer
 - The phone number displayed to the voter is a 941 random number
 - If the voter calls that random number back, it rings at HQ
- Doing a trial of this technology for Venice City Council, hope to repeat for the midterms

Campaign Phone Bank Phases



FDP Definitions of Voters

- **HOT** DEM
 - Voted in 2018 and 2020
- **WARM** DEM
 - Voted in only one of these elections: 2018 or 2020
- **COLD** DEM
 - Voted in neither (and were registered)
- **NEW** DEM
 - Newly registered and may have questions or need support

What Does a Phone Bank Look Like?

(Current Phone Bank for Sandy Sibley Venice City Council Candidate)



Sibley NPA no VBM

Log Out

About Janet

Date of Reg

1/14/2020 12:00:00 AM

General 2020

E

Party

NP

Voting City

North Venice

ℹ If you have questions about this phone bank, please contact: Joan Roscoe • (540) 409-7660 • jroscoe07@gmail.com

Janet Leahy

(303) 617-0905 ● Not Connected

79-year-old F

Call

Skip

Save & Next Call

I Couldn't Reach Janet

Hello, my name is _____ and I am a local Venice volunteer with the Sandy Sibley for Venice City Council Campaign. How are you today?

Sandy is running on a platform of responsible growth to keep the charm of Venice.

Do you support responsible growth that keeps the charm of Venice and will you be supporting Sandy in the November election?

Choose an option ▼

Do you support responsible growth that keeps the charm of Venice and will you be supporting Sandy in the November election?

Choose an option ▾

Choose an option

Yes

No

Unsure

Sandy – thanks for taking my call

Supporting Sandy – please check out Sandy's

SandySibley.com and thanks for taking my call

If YES supports Sandy Sibley – Have you considered Vote by Mail for the election this November? Vote-by-Mail is a safe and effective way to vote for Sandy this November.

May I have a Vote-by-Mail application mailed to your home so you can vote in the fall for Venice City Council candidate Sandy Sibley?

Choose an option ▾

Choose an option ▼

If YES -

Ok great! We will get the application and a self-addressed stamped envelope out to you ASAP. You will want to sign the application and mail to the Supervisor of Elections. You will then receive a Vote-By-Mail ballot about 6 weeks before the Nov. 2nd election. Remember to vote for Sandy Sibley.

If NO - if you change your mind about Vote-by-Mail, go to SarasotaVotes.gov to apply for Vote-by-Mail. Remember to vote for Sandy Sibley.

1126 Voted Venice 19

☐ 1126 Voted Venice 19

Stop Making Calls

Sibley NPA no VBM

Log Out

Date of Reg
10/11/2019 12:00:00 AM

General 2020

Party

NP

Voting City

Venice

Maria Velez Cespedes

(331) 332-0003 ● Not Connected

58-year-old F

I Couldn't Reach Maria

- ☐ Not Home
- ☐ Refused
- ☐ Deceased
- ☐ Moved
- ☐ Spanish
- ☐ Busy
- ☐ Wrong Number
- ☐ Disconnected
- ☐ Hostile

Cancel

Save & Next Call

Sibley NPA no VBM

Log Out

About Ryan

Date of Reg

2/28/2017 12:00:00 AM

General 2020

M

Party

NP

Voting City

Venice

If you have questions about this phone bank, please contact: Joan Roscoe • (540) 409-7660 • jroscoe07@gmail.com

Ryan O'Mahony

(941) 484-2263 • Not Connected

22-year-old M

Call

Skip

Save & Next Call

I Couldn't Reach Ryan

Hello, my name is _____ and I am a local Venice volunteer with the Sandy Sibley for Venice City Council Campaign. How are you today?

Sandy is running on a platform of responsible growth to keep the charm of Venice.

Do you support responsible growth that keeps the charm of Venice and will you be supporting Sandy in the November election?

Choose an option

Pain Points

- Leaving Messages
 - We only leave messages at specific times in the campaign
 - This is proven campaign practice
 - Yes, we know this can be frustrating for volunteers
- Calling-Calling-Calling
 - “I am so grateful that you called – I need help”
- Hostile Voter – I’m Voting for DeSantis”
 - Even though you spoke to this voter – mark them HOSTILE on the Drop Down “I Couldn’t Reach”
 - This is a **PERMANENT** block
 - That voter will never be called by us again

Pain Points, Cont'd.

- “Stop Calling Me” “I Am Getting Too Many Calls”
 - Our computer system notes every touch with that voter (door knock, call, left message, lit drop) EVERYTHING
 - Other groups may also be calling that voter: Swing Left, The GOP, Planned Parenthood. Coordination is getting better between groups
 - If this is a friendly voter – simply explain that there’s so much on the line thus the heavy call volume
 - **We really don’t want to mark them “Hostile” which is PERMANENT**
 - Why? WE WANT THEM TO VOTE – THEY NEED TO TAKE ACTION
 - Maybe they are a Warm or Cold or New DEM
 - **“Mail back that ballot and all calls stop!”**
 - **“Go to Early Voting and all calls stop!”**



Participants:

Carolann Palm-Abramoff: Area Leader with SCDP for the Southern County (SoCo)

Joan Roscoe: SCDP Phone Bank



Questions & Answers

This guy phone banks – will you phone bank??