

## Phone Bank Organizing Tip Sheet

Make the most out of the HIV hotline! Mobilize your network to protect essential programs and policies that support people living with and vulnerable to HIV. One easy way to do this is to organize a phone bank among your organization's clients, staff, volunteers, and donors. Follow these simple steps to tell Congress to oppose policies that hurt people living with and vulnerable to HIV and support legislation that helps the HIV community.

### 1. Determine your list.

Your organization likely has a number of lists that could be used for phone banking. Advocates, volunteers, and donors are just a few. Calling these individuals not only contributes to overall mobilization efforts, but can also strengthen personal connections between your organization and its constituents. Create a call list of constituents your organization determines to be the most appropriate to engage with advocacy phone calls.

### 2. Create call sheets.

Call sheets help keep your phone bank organized. If you are targeting a specific political party, legislator or region, it can help to sort your list by district first so you can create lists of priority calls. We recommend 10 constituent names per sheet to create a do-able and efficient number of calls for your phone bank volunteers. Calls sheets should include the constituent name, phone number, and columns that indicate whether the caller spoke to a constituent or left a voicemail, whether the constituent committed to take action, or if the number was wrong. Tracking this information helps you measure your organization's impact and maintain the health of your list.

### 3. Prepare a script.

Having a script helps ensure delivery of a consistent message and makes callers feel more comfortable. The script should be short and simple. It should include an introduction of the caller, a brief overview of the issue, the action that being urged, and a request for confirmation that the action will be taken. You can also use the sample script provided the HIV hotline organizers.

### 4. Recruit and train your callers.

Ask your coworkers, clients, and volunteers to join your phone bank. Can you get staff to commit to make at least 10 calls? (Hint: have each call-sheet be a list of 10 constituents.) Make sure they feel comfortable placing calls. Provide them with an overview of the issue. Take time for questions. Walk them through the script. Model a sample call so they can see how easy it is.

### 5. Report back and express gratitude.

Be sure to share the outcomes of your efforts. Let them know how many calls were made thanks to the collective efforts of staff, volunteers, and clients. Thank callers them for their time and effort. Remember we are in a marathon fight that requires the time, attention, and support of our entire community. Acknowledging the callers' contributions will help increase the likelihood of them volunteering to help again.