



Get Out the Vote: Phone Banking

One effective way to Get Out the Vote (GOTV) in your Section and community is through phone banking. Nonpartisan phone banking is a method of voter contact whereby individuals make calls to rally support/opposition to a ballot measure, or in the case of GOTV, to ensure voters have a plan to get to the polls. When planning your phone banking events, remember the rules that govern National Council of Jewish Women (NCJW) as a 501(c)(3) tax-exempt organization allow us to advocate and educate only on policy issues, not candidates. While you cannot tell individuals to vote for a specific candidate, party, or ideology, you can emphasize the importance of voting. Additionally, you can express positions on ballot measures.

Phone banking is a fantastic opportunity to develop new leaders, engage civically, energize volunteers, reconnect with NCJW members, and remind others to vote! If you have questions about how to organize a GOTV phone bank, please contact Faith Williams at fwilliams@ncjw.org.

The Basics

Phone banking is a fun and accessible group activity for new and seasoned advocates to take action. One of the goals of GOTV phone banking is for the caller to help the voter create a plan about when, where, and how they will cast their ballot. This visualization technique increases the likelihood that they will vote. Please refer to the call script later in this resource for suggested language to use when speaking with a voter about their plan to cast their ballot.

To organize a successful in-person phone bank, be sure to have the following:

- A dedicated individual, trained in phone banking, to train the volunteers
- Volunteers to make calls
- A draft agenda for those running the phone bank
- Assigned roles for those running the phone bank (see below)
- Phones for volunteers to use — consider office or cell phones
- A separate and dedicated space for calling, keeping in mind that phone banking can get loud. When finding a space, consider how many volunteers have committed to coming
- Water and light snacks for volunteers

- Call sheets, i.e., phone numbers of voters for volunteers to call with space to mark responses. *For an NCJW phone bank, we suggest calling through a list of Section members and recording whether you were able to reach them, what the outcome of the call was, and whether they will need a follow-up call to remind them to vote. See the last page of this resource for a **sample call sheet**.*
- Sign-in sheet for volunteers, with space to collect contact information
- Copies of your vote plan script (*see the **sample vote plan script** below*)

You do not need a lot of volunteers to hold a phone bank — small groups can call many voters. You can also organize virtually and achieve the same goals.

Assigning Roles

It is important that volunteers feel welcomed and valued. You can do this in many ways. Assigning roles to seasoned and emerging leaders can help ensure volunteers have an enjoyable experience and your phone bank is successful. *This is a great leadership development opportunity.* All the roles below should be filled, and some people can take on more than one.

- Greeter: Welcomes volunteers as they arrive and asks them to sign in.
- Trainer: Thanks volunteers; explains the phone bank; reviews the vote plan script and ensures that volunteers are comfortable.
- Coach: Mentors volunteers if they are nervous, have a challenging call, and/or have questions.
- Data captain: If documenting online, sets up the spreadsheet and ensures volunteers understand how to use it. If using paper, collect call sheets with notes, compiles information.
- Debriefer: At the end of the phone bank, thank volunteers and debriefs with them about what went well and what was challenging during their calls.
- Site Coordinator: Ensures all furniture, equipment, materials, food, etc. are set up before the event starts, or organizes a virtual space like Zoom in which to hold the event.

Volunteer Engagement

Organizers should have regular communication with phone banking volunteers from recruitment to follow-up. To make phone bankers feel welcome and prepared, here are a few essential steps:

- **Before:** Share the event schedule, any logistics they should know (location, travel, accessibility information, what to bring), and include an encouraging message, especially for first timers

- **During:** Before calling begins, ensure everyone understands the purpose of the phone bank, why phone banking was chosen as the method of action, and the shared goals
- **After:** This is a great engagement opportunity for new and returning members alike. Take the time to follow up with a thank you note, email, or an invitation to have a one-on-one conversation with those who are looking to get more involved

Draft Agenda (for a 2-hour phone bank)

- 30 minutes before: Leaders arrive at the space to set up and prepare for volunteers
- 15 minutes before: Volunteers arrive and are greeted at the front door
- Start time: Short training to welcome volunteers: start with introductions, explain what they will be doing and why, provide any relevant updates, explain call sheets and notes needed, and review the vote plan script they will be using
- 30 minutes: Volunteers start calling voters
- 90 minutes: Volunteers make their last call
- 100 minutes: Volunteers turn in call sheets to data captain with information* about whom they called and who answered, begin debriefing**
- 120 minutes: Volunteers leave, leaders clean up space

Please see the **sample call sheet on the last page of this resource.*

***Always take time to debrief with the volunteers and the leaders and thank them for their important contributions. Provide a space for volunteers to talk about their rewarding or challenging conversations and discuss how they might handle the call differently next time. Acknowledge how many total conversations have happened so far throughout the GOTV campaign and specifically the number in this phone bank, so they see how their volunteering fits into the bigger picture. All these efforts help ensure that volunteers are invested in the effort and are thus more likely to stay engaged.*

Get Out the Vote: Phone Banking Call Script

This is a script for making a vote plan with potential voters - like people in your NCJW Section. When people visualize going to vote, they are much more likely to show up on Election Day. It is also a terrific way to engage your local NCJW members!

Sample Script:

Hello, may I please speak with _____? My name is _____ and I am from the National Council of Jewish Women [Section name]. I am calling to remind you that an election is coming up in your area and want to offer a friendly reminder to vote on [date of election].

Can we count on you to vote?

If no:

I'm sorry to hear that, is there anything holding you back from voting? Can I help you figure out where and when you can vote on Election Day? *(If yes to wanting help on voting, see below to help them plan to vote.)*

Thank you very much for your time. If you change your mind and decide to vote, a reminder that polls are open from ____ to _____. All elections are important, and every vote will count.

If yes:

Great! Do you know what time you are planning to vote: Morning, Afternoon, or Evening?

That sounds great! As a reminder, polls are open from ____ to _____. Do you know where your polling place is? (If no, look up their polling location on your county or state election website)

Great! Do you need a ride to vote, information on public transportation information? Do you have access to childcare if you need it? *Only ask this question if you are prepared to connect them with resources to help with transportation or childcare or help them think through talking to families or friends who could help.*

Do you know another voter you could bring with you?
Thank you so much for voting!

Remember to be conversational. Even if they have already voted, use this opportunity to highlight upcoming Section events or other opportunities with NCJW. Show people you are invested in them as members and fellow advocates, not just as voters.

If already voted:

Great, I'm glad to hear that! Do you know other folks who haven't voted yet? Could you remind them to vote, too?

If enthusiastic: Would you want to volunteer with us to remind fellow NCJW members to vote? (If yes, connect them with the phone bank coordinator or take down their information to give to the coordinator in your Section.)

If voicemail:

Hi, this is _____ calling for _____ and I'm a volunteer with National Council of Jewish Women _____ (Section Name) _____. I'm calling to remind you about the upcoming election on _____. All elections are incredibly important, so we want to remind you to vote.

Polls will be open from _____ to _____ on _____.

We look forward to seeing you at the polls!

Best Practices:

- Be conversational. Use the script to inform the questions you ask. Try not to read directly from the script
- When speaking on the phone, smile – it makes a difference in how you are heard
- Use these calls as an opportunity to highlight upcoming Section events or other opportunities with NCJW. Show people you are invested in them as members and fellow advocates, not just as voters
- Keep calls brief
- Do not discuss candidates or political parties with voters
- Record necessary responses*, such as if the voter has already voted.

Collect the following information: not home/no answer, had a conversation, wrong address/number, deceased, refused to talk/do not call, and wants to volunteer with NCJW. This will allow you to know who to call again, who needs to update their contact information, and who else would like to join the next phone bank. To view an example, see our **sample call sheet on the next page. Recording responses helps the phone bank coordinator organize their next phone bank and ensures people do not receive repetitive calls or a second call after they have refused.*

Sample Call Sheet*

Date of Phonebank: Month / Day / Year

Name	Phone Number	Address	ZIP	Email	Contacted?	Section Member?	Notes
Anne Wu	(123) 456- 7890	111 Riverside Ave, Suite 1929	20026	<i>annewu@ncjw.org</i>	<i>No answer</i>	Yes	<i>Left voicemail</i>
Ari Berkowitz	(111) 222- 3333	1836 J St NW	20066	<i>Berka@ncjw.org</i>	Yes	No	<i>Didn't know where their polling place was. Confirmed location for them.</i>
Ben Saint	(444) 555- 6666	1936 U St NW	20026	<i>BSaint@ncjw.org</i>	<i>No answer</i>	Yes	
Casey Williams	(777) 888- 9999	123 Main St	20026	<i>noemail@noemail.com</i>	Yes	Yes	<i>Unsure if she has a ride to the polls. Call back to follow up.</i>
Harry Potter	(546) 987-2480	2046 Columbia Ln NE	20059	<i>Unknown</i>	<i>Refused</i>	No	<i>Will not vote</i>
Gloria Villa	394-294- 5507	936 Garry St	20030	<i>Unknown</i>	Yes	No	<i>Wrong number</i>
David Freeman	321-943- 9354	123 Main St	20016	<i>Unknown</i>	No answer	No	<i>Left voicemail, follow up</i>
Jamie Alfonso	455-455- 4555	10 6th St SW	20005	<i>Unknown</i>			
Shiyu Cheng	888-888- 8888	700 2 nd St	20002	<i>SCheng@sample.or</i>			

*Call sheets should be pre-filled with names and phone numbers, and any other information already known – like membership status. Volunteers will fill in the “contacted” and “notes” columns during their calls. For events with access to the internet and computer resources, consider using a google spreadsheet or invite volunteers to bring their laptops or tablets.