



Every Voice, Every Vote

Campaign Action Toolkit: Phone Banking and Text Banking as a Community

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Phone and Text Banking Planning Guide

As part of the 2022 Every Voice, Every Vote Campaign, we are partnering with several local and national partners to reach out through phone calls and text messages to potential voters in communities where there is a significant number of People of Color and low voter participation (often because of voter suppression).

The primary goal of our 2022 campaign is engaging 400,000 voters in this election. The first phase of our campaign was focused on sending postcards, and we also engaged in some “deep canvassing” phone calls. Now, it is time to launch additional voter engagement actions. Across the country, Reform Movement leaders are mobilizing their congregations and friend groups to reach out to voters in their own and other communities.

The easiest way to participate in phone (or text banking) is to join an already scheduled session (see times below). You can get a group together and join the zoom on one screen or arrange to have your own zoom before or after the scheduled session. If for some reason your group cannot make any of the scheduled times, we encourage you to [use Reclaim Our Vote’s tools](#) and schedule your own. If you are calling voters through another nonpartisan partner, please let us know at www.rac.org/evevreport.

Why is it worth sending texts and making phone calls?

Because they work! While not as effective as in-person conversations, phone calls and texts have been proven to motivate people to register and vote and can also provide them with the information to do so, especially in areas where registering and voting are made more complicated and difficult by voter suppression measures. One of our partners, [Reclaim Our Vote](#), has shared data with us that show that one phone conversation made it 47 percent more likely that the contact would vote. Even leaving a voicemail improved turnout by 16 percent!

Phone calls and texting are also great ways for people who live outside of targeted areas to participate in helping persuade people to vote.

Many of our partner-led phone banks utilize tools that will dial numbers for you, only connecting you if someone picks up, and do not show the voters your personal number (they will show an in-state campaign number).

Why create an event for phone banking or text banking?

While individuals can make calls and send texts from their homes, creating an event where people can do outreach together (either in person or virtually) is an opportunity to leverage this activity to foster connection and build relationships among leaders and activists in your congregation and community. Events build excitement to get people to sign up and to follow through on their commitments. They also help participants to have a better experience, where others can celebrate their successes. Phone bank and text bank events are a space to come together around a shared purpose and shared values, and especially around what is at stake in this election.

The more Group Leaders who organize these events, the more voters we will reach through this campaign effort!

Our Phone Banking Partners, Times, Logistics

Below are the partners and actions we have available. Please be sure to pick specific dates, times, and partnerships for your events. [When you have decided these, please let us know what your plans are by filling out this form.](#) This will help us coordinate with our partners and support you.

- Every Voice, Every Vote: Every Week calls on Wednesdays. Times, states, and actions vary. Typically beginning between 5 and 6 PM eastern. [Register here.](#)
- Calling Voters in Pennsylvania: One PA Phone banking every Wednesday and Thursday, 1-3:30 and 5:30-8 PM eastern. [Register here: please share your congregation name or RAC when registering.](#)
- Calling Voters in Florida: Phone banking with FL Rising [Tuesday, September 20](#); [Thursday, October 13](#); [Tuesday, October 25](#); and [Thursday, November 3](#) from 6:00 pm - 8:00 pm eastern. Click desired date for registration.
- Calling Voters in Georgia: Phone banking with New GA Project Mondays, Wednesdays, and Thursdays from 5:30-8:30 PM eastern. [Register here.](#)
- Calling Voters in North Carolina: Phone banking with Carolina Jews for Justice, New NC Foundation, and UU Justice NC on Thursdays from 6:30-8:30 PM eastern. [Register here.](#)
- Protect abortion access in Michigan! Call voters to vote Yes on Prop 3 with the Reproductive Freedom for All Campaign on Tuesdays and Thursdays from 6-8:30 PM eastern. [Register here and indicate you are joining with the Religious Action Center of Reform Judaism.](#)
- Join with Dayenu A Jewish Call to Climate Action to call low-propensity, high potential climate-concerned voters across the country. [See dates, times, and registrations here](#) (note that Dayenu has scheduled some phonebanks that start in the evening on the West Coast).
- Reclaim Our Vote: Guided phone banks on Tuesdays from 6-8pm eastern and Wednesdays from 4-6pm eastern or calls on your own time (a training video is provided). [Instructions, registration, and more](#)

[available at this link](#). States change depending on the timing. When logging into Reclaim Our Vote's call tool, please select "Religious Action Center of Reform Judaism" under Volunteer Organization.

Text banking opportunities and partnerships will be announced soon. Due to new Federal texting regulations, it is much more difficult to send text messages to voters, so most text banks will happen closer to Election Day in November.

The Planning Process

Step 1 – Goal Setting: Begin by setting concrete goals for your event as well as turnout goals.

Here are some questions to help guide that process:

- How many conversations do you want to have?
 - Estimating that someone will have about 5 conversations in a single sitting, you can connect your turnout goal to the impact you want to have. For example, if you want to have 60 conversations, then you need 12 people to come to the phone bank event.
 - These numbers could be higher for texting.
- Who do you want in attendance at the phone bank?
 - Be as specific as possible: Think about both how many people you want and specific people you want to show up.
 - What do you want to learn about who's there? What do you want them to learn about each other?
- When will it take place? Where will it take place?
 - In-person or virtual? Most of the phone banks and text banks we are participating in are "guided," which means they start off with a Zoom meeting that includes training and additional guidance. Some of the phone banks can be done on your own time (within good hours to make calls).
 - If you would like to have members of your community join a virtual phone bank from their homes, consider scheduling a separate Zoom meeting before and/or after the phone bank to connect with one another and make sure everyone has what they need for the phone bank itself. You can then head over Zoom meeting where the actual phone bank will take place. If the partner has not set up a Zoom for the phone bank, you can keep yours open the whole time so that people can stay connected. They can either mute their microphones and speakers or "[leave computer audio](#)" while making calls.
 - If you would all like to gather in one place to join a virtual phone bank, here are some logistics to consider:
 - Will you join the Zoom phone bank from one device for the whole room or will each person join from their own device?
 - Do you have enough space for people to make calls without talking over one another?
- What supplies will you need or will you need people to bring?
 - For phone banks, everyone making phone calls will need both a phone and a computer or tablet where they can access the script and phone calling tools.

- For text banks, some partners require you to download an app on your smartphone and with others you can send text messages through a web browser.
- What other things can you do to make people feel engaged, comfortable, and connected?
 - Virtual Gathering
 - Set up a group text to use during the phone bank to share how you're doing in real-time (you could also set up in advance for turnout!)
 - Share trivia in the Zoom chat or by group text about the location the group is calling/texting
 - Share information about recent voting rates in the location
 - If the group is calling, ask people to mention in the chat/group text every time they successfully reach a potential voter
 - If the group is sending texts, encourage people to talk and get to know each other as they write their texts
 - If the group is sending texts, play music
 - In-Person
 - Set up a sign in table with stick-on name tags and markers
 - Provide snacks and beverages
 - Think about the table/seating arrangement
 - What kind of communal experience can you facilitate in that space? Will attendees sit together in small groups or at long tables?
 - Is this a way to connect people who do not know each other?
 - Consider marking the moment with a blessing or another Jewish grounding. You can offer [the blessing provided on this small card](#) or another of your own choosing or creation. If you are gathering in person during Sukkot consider spending some time in the Sukkah.
- What next steps do you want them to take?

Make sure everyone you're planning with (who will help with turnout and logistics) is part of setting these goals. At the end of the event, look back together and evaluate whether you achieved those goals.

Step 2 – Turnout: Get your turnout operation up and running. It's best to start this soon, as people will need to take time to do it effectively. Check out the resources below for some tips for turnout, but above all make sure you are (1) doing turnout as a team and (2) having direct conversations with people you want there. [Check out the resources below for more information turnout and organizer's math.](#)

Step 3 – Confirm Logistics and Partnerships: If you haven't yet, [please fill out this form to let us know what your plans are, so that we can coordinate with partners and support you.](#) Make sure all of your logistics are set and that you understand what is needed from you from the phone banking partner. Our partners are counting on us to bring volunteers and have done the work of creating the script, list of people to contact, and tools to contact voters. If the phone bank you chose has its own registration, make sure your attendees register there to receive vital information, and make sure the partner knows you are there with the RAC.

Step 4 – Host Your Event ([Sample agenda Below](#))

Step 5 – Follow Up

1. What follow-up conversations do you want to have?
 - a. With people who ended up not attending
 - b. With people who did attend to get feedback/discuss next steps
2. What will your next action be?
3. Share how things went with us (email campaign@rac.org)

Sample Pre/Post-Phone or Text Bank Agenda: 30 minutes (length is flexible)

1. Welcome and introductions

- a. Collect attendance.
- b. The Group Leader/event host should welcome attendees and explain the purpose of the event.
 - i. As part of the Reform Movement's 2022 Every Voice, Every Vote Campaign, we are partnering with [PARTNER] to contact potential voters in communities where there is a significant number of people of color and low voter participation.
 - ii. Across the Reform Movement, our goal is to contact 400,000 voters. We started by sending postcards [add final postcard numbers if you have them]. Our goals for today's phone/text banking event are both to contact X number of voters and to build community with one another.
 - iii. This work is 100% non-partisan, and deeply rooted in our Jewish values of racial justice, protecting and strengthening democracy, and creating a future where we can make positive change on all of the issues that are important to us.
- c. Depending on the size of the group, facilitate introductions
 - i. In a round or in small groups: Ask everyone to share their name, pronouns, and what or who brought them to this event
 - ii. Talk about a person or issue that is important to you and motivates you to encourage more people to vote.

1. Sample issue-based discussion questions

- a. What and/or who inspired you to attend this event?
- b. What does it mean for you to help ensure that every voice is heard, and every vote is counted in this election?
- c. What is one memory that sticks out in your mind related to voting?
- d. What's at stake for you in this election?
 - i. How does that motivate you to ensure every voter shows up and every voice is counted?

2. Partnership and Logistics

- a. Who are we calling with, and what is our role?
 - i. Take some time to share a bit about who you will be calling and the partner you're making calls with.

- ii. Remind folks that we are working in partnership with organizations with deep experience in contacting voters and an understanding of what will move the voters we are trying to contact. Our role is to strengthen their efforts and follow their leadership.
 - iii. If useful, look back to our campaign's [foundational training](#) for more guidance on how to show up in partnership.
 - iv. Make sure everyone is committed to following the script provided.
- b. Logistics/What to Expect
- i. Take some time as a group to read through any instructions provided. The partner organization may provide a Zoom for training. They may provide a video that you can share at your event.
 - ii. If you are joining a partner's Zoom, make sure everyone is registered for that Zoom and has received the information they need.
 - iii. Remind people that we may encounter technical issues or challenges. We shouldn't take it personally and recognize that all of us, and our partners, are doing our best given the capacity we all have.
 - iv. Make sure everyone has the materials and devices they need.

3. Action

- a. If you are joining a partner-led Zoom phone bank, go over to that link now.
- b. Make sure the partner knows you are with the RAC.
- c. Give a good amount of time to make calls/send texts!
- d. Think back to how you can make people feel engaged, comfortable, and connected during this time.

4. Debrief

- a. Go over how many calls the team made (or texts sent) and celebrate this!
- b. Share (in small groups or large group, depending on the size) some reflections. Sample reflection prompts include:
 - i. How did it feel to call or text people? How did this experience compare to what you were expecting?
 - ii. How did people react?
 - iii. How did this experience compare to what you were expecting?
 - iv. What else do you want to do to protect and expand democracy?

5. Close

- a. Share appreciation for everyone who helped make the event possible.
- b. Outline any next steps you want to invite people to take. This could include:
 - i. Recruiting people to join your Voter Engagement Team (or similar social justice group)
 - ii. A future phone or text bank event
 - iii. More relationship building – people could have 1:1 meetings with each other
 - iv. Joining the Every Voice, Every Vote: Every Week Calls

Turnout and Goal Setting (adapted from a handout by Janice Fine, Northeast Action)

We have learned that you can't just say "if we build it, they will come." Most of the time, just holding an event is not enough – we must do turnout, reaching out and inviting people to come to the event. To help guide our turnout we take a scientific approach to turnout that we call "Organizers Math." Here's how it works...

First, we need to have a clear plan and numerical turnout goal. Then if we have a good plan, and enough time to carry it out, if we remember that people don't show up just by email outreach but must be invited through conversation, we can usually do respectable turnout. We will set benchmarks along the way where we can check in about how it is going with those who are calling to recruit attendees. If we have done a turnout plan and carried it out, there should be no major surprises on the day of the event -- we should already know the approximate attendance before the first person walks across the threshold!

In setting a numerical goal for turnout, the four most important questions you want to ask yourself are:

1. How many people do we want at this event? Set your goal. Challenge yourself. Choose a stretch goal, but one that still seems doable.
2. How many people do we have to ask to find the 1 in 4 (25%) or 1 of 5 (20%) or 1 of 6 (17%) who will say yes?
3. Not everyone who says yes will actually show up on the day of the event. There will be a flake factor. How many of the people who said yes will actually show? It could be 3 out of 4 (75%) or 1 out of 2 (50%) that actually show up. If you think only 50% of the yeses will show up, that means you need to recruit twice the number of yeses to reach your target goal.
 - i. *Note that the percentage of yeses that will flake and of people who will say yes when asked is not constant. These percentages will be different for different populations and events. Some events and actions and issues you do will be a harder sell. Even within the same congregation, you will get different percentages if you are asking everyone in the congregation or just those who have participated in social justice before.*
4. Where will these people come from? (What is the total universe of people you are going to ask? Is it the whole congregation? Is it people who have come out to events or volunteered in the past? Be clear on who is in the pool of people you are going to ask.

Goal Setting Chart

Fill in the yellow boxes below with your turn out goal and your estimates for the Yes Rate and the Show Rate. The blue box – Invitees or the number of people you need to invite to reach your turn out goal – is determined by this formula: Turnout Goal ÷ (Yes Rate x Show Rate). [This chart here will do the math for you.](#)

	Your work	Example	Number format
Turnout Goal		30	people
Yes Rate (% of people who will say yes when asked - remember some people will say no)		40	%

Show Rate (% of yeses that will actually attend - accounts for flaking)		50	%
Invitees (# of people you need to ask to meet your turnout goal)		150	people

Relational Organizing

Relational organizing is significantly more successful than other methods of contacting people (like bulk email, or commercials about an issue, or phone calls, or mass-texting strangers). That is because it all relies on your personal relationships - your network of friends and family and classmates. You are a trusted source for them, so they listen when you tell them something or invite them somewhere.

Relational organizing is a core component of this campaign in part for us to build our power long-term. Effective social justice work means always thinking on two levels: how are we successful now and how we are building for greater successes in the future.

Examples of Relational Outreach

In-person 1:1 conversation

Zoom 1:1 conversation

1:1 phone conversation

Personal email (followed up with a phone call if they don't respond)

Personal text (followed up by a phone call if they don't respond)

Relational Organizing Worksheet

Guiding Questions: Use the questions below to strategically think about who and how you should reach out to individuals within your community.

1. Before you begin outreach, brainstorm people within your informal network you can ask to attend the action and think about individuals in your community with formal networks who can support attendance recruitment. What are the different groups within your community? (For example, the temple sisterhood or brotherhood, social action committee, religious school, the board) Who within those various groups can you identify as leaders, who have strong connections within their respective group and would be willing to do relational turnout within their group? Ask them to identify people they can reach out to, and add those people to the outreach list (with the leaders of the groups identified as the people who will do the outreach to their own list).
2. When you are identifying individuals within your community, think about what their self-interest in participating might be. People are more likely to participate if they have a personal connection to an issue or action.
3. Reflect on why you are asking a specific person to participate. Each individual contributes their own unique value. Let that person know why you want them specifically to participate.
4. Who in your community might not be an established leader yet, but has potential to take on more leadership? This is a great entry point to build up leadership and engage individuals who may not think of themselves as leaders yet.

Ideally, the contact people should have a prior relationship with the people they are contacting. But it is OK for people to contact people they don't yet know – it is a chance to start a new relationship.

Fill out your own chart using this template. It is recommended that you recreate this in Google Docs to easily share with your outreach team:

Contact	Contact's Network or Group Name	Outreach Person (individual reaching out to contact)	Contact Method	Results of Contact