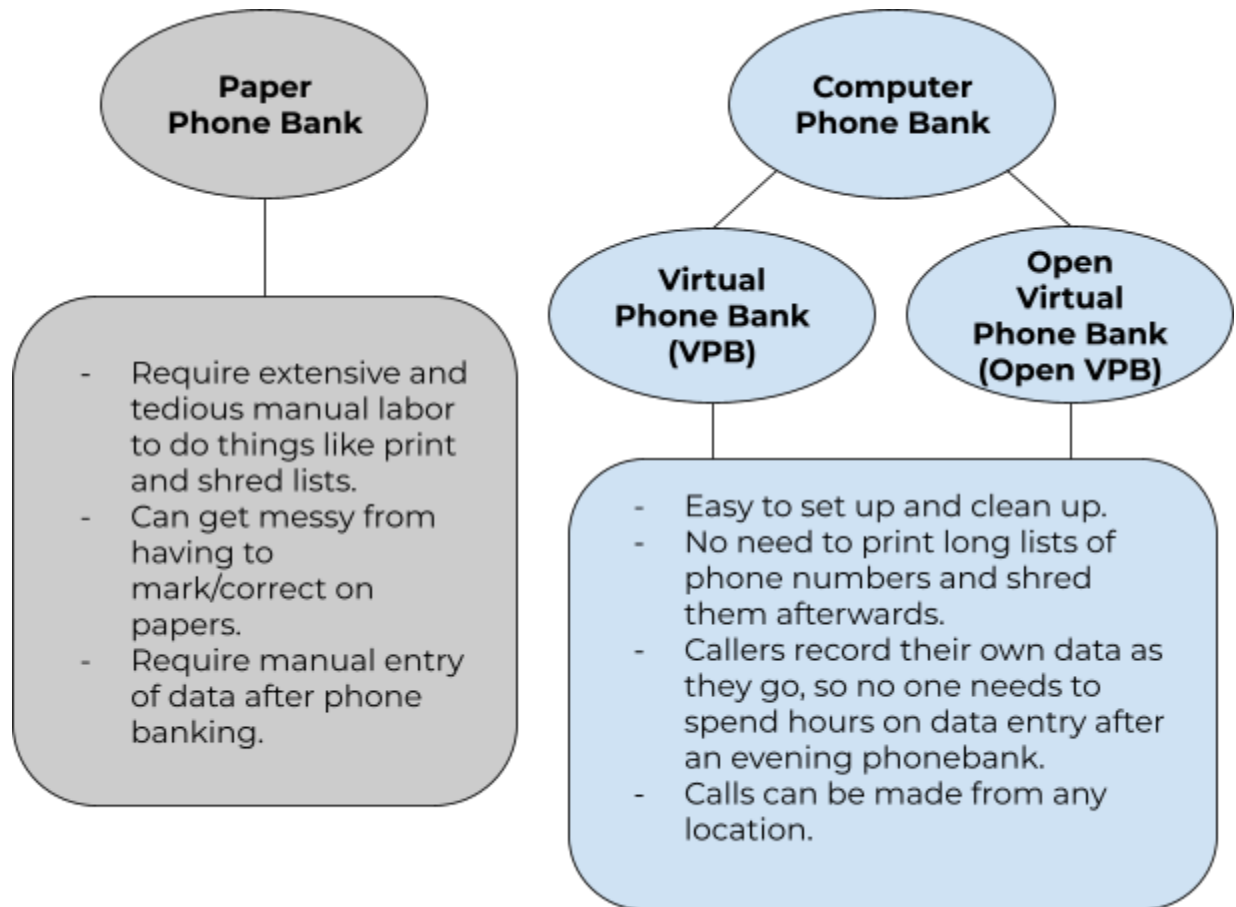


Virtual Phone Bank (VPB) and Open Virtual Phone Bank (Open VPB)

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What are the different types of phone banks?



Key similarities and differences between VPB and Open VPB

	Make calls/ record data from anywhere	Need ActionID to use	Need a VAN account to use	Access via	Change/ Update Contact Information	Designate specific events shown to callers (Event Scheduler)
VPB	✓	✓	✓	VAN	✓	✓
Open VPB	✓	✓	✗	OpenVPB.com	✗	✗

As a VAN Admin, how do I create a VPB or Open VPB?

Please watch our [video](#), or follow the below instructions:

Step 1 - Create A List and Run Search:

- Just like creating a list for a block walk, you will need to create a new list under [Create A List](#).
- You can select your targets, any other limiting factors, and then click [Run Search](#).
- Notes: If you have two phone banks that have overlapping lists, then a contact could be double called. You will want to make your phone banks have mutually exclusive lists.

Step 2 - Getting Set Up:

- Once that list is cut, select the [Calls](#) button (the phone symbol) and select [Set up Virtual Phone Bank List](#), then click [Next](#).

Step 3 - Choosing the VPB settings:

- When Setup a Virtual Phone Bank pops up, select Save and use my search criteria. It is important to use these saved searches rather than fixed lists to ensure no double calling and to remove people who no longer match the search criteria.
 - Important notes, if you want the saved search to update, you must Refresh & Send to Next Round.
- You are then prompted to create/select a Folder, a name for the VPB and Script. The Folder feature is helpful in case you want to create multiple VPBs for the same purpose, such as wellness checks. There is also the optional Description field for you to include more details about the VPB. Click Continue when finished.
 - Scripts need to be already created before they would appear as an option in the drop down menu.
 - If the script that you are using for your VPB does not have any boxes checked for both Phone Results and Walk Results, then you will not see the red outlined box that says “I Couldn’t Reach (Name)” while phone banking.

Setup a Virtual Phone Bank

☐ Use this static list (Fixed set of people)
☒ Save and use my search criteria
☐ New Search
☐ Replace an existing Search

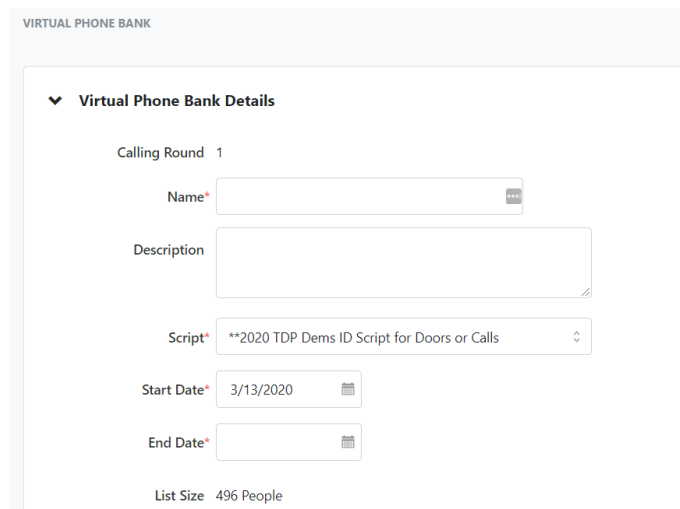
☒ Folder*

☐ New Folder

Name*
 Description

- In the Virtual Phone Bank Details page, you can choose a name, script, start and end date for the phone bank.
 - We recommend that you complete all entries with red asterisks, and, to publish your VPB to openvpb.com so your volunteers without VAN accounts can access it if needed.
 - You should also select Attempt all alternate numbers to maximize your chance of contacting voters.
 - Skipping options can be useful when other committees may have called a voter and eliminated all their phone numbers as bad, leaving

- your caller with no phone numbers to call. With the Skip button, your caller can then proceed through the VPB without recording false data..
- Regarding Display Settings, you should select all boxes under Basic Demographics, except for Party, so your callers can have a sense of who they are talking to. Contact & Location Information and Additional Contact Details can be left as is unless you have a specific preference for one of the boxes. Editable Contact Details should all be selected so your callers can update information as needed while phone banking.
 - Note: In OpenVPB, only the Notes will be editable which means there are many limitations to what your callers can edit. If any of your callers participating in the VPB does have a VAN account, you should have them use VPB instead of OpenVPB, so they can edit more fields as needed. For more frequent callers, you can set up VAN accounts that are limited to using VPB and MiniVAN.
 - You should always select Show Entire Phone Bank Progress under Progress Bar so callers can see how the phone bank is progressing.
 - Note: For very large phone banks, this can be discouraging to callers as they never see it move. It may be better to set the Contact Limit to 50-60 Attempts, then also select to display the Individual Progress Bar. Then, the caller has a reachable goal for their shift and can see the progress being made.



Sharing to OpenVPB:

- As mentioned above, Open VPB is useful in giving your phone bank access to callers without VAN accounts -- all they need is their Action ID (instructions on how to create an Action ID can be found below).
- This option allows you to create a code and link for Open VPB by selecting Publish to openvpb.com -- the code and link will show up on the following

page once you completed your settings and click Next or Save & Preview near the top right of screen.

▼ Sharing

Open Virtual Phone Bank
(openvpb.com) ☒ Publish to openvpb.com
☐ Not Visible on openvpb.com

Display Settings -- Control what phone bank users will see

- Via this Display Settings panel on the right side of the screen, you can:
 - Customize the display screen that callers see while they're phone banking.
 - Select fields for Upper and Lower Display.
 - Update records to include preferred numbers or contact methods.
 - Choose the types of contact information that will be displayed and which ones will be editable by callers.

Display Settings

Save & Preview

Customize the layout and information displayed on your Virtual Phone Bank.

▼ Basic Demographics

[Select All](#) | [Deselect All](#)

☒ Age

☐ Party

☒ Source File Sex

▼ Contact & Location Information

Enable read-only information shown for each contact on the list.

☐ Display Above the Script

☒ Display Below the Script

[Select All](#) | [Deselect All](#)

Step 4 - Publish/Confirm Settings and Sharing VPB with Others

- Once you have finalized all settings, you can click Next near the top right of the page.
- **You should now see the VPB Code and OpenVPB link (if you opted to publish them to OpenVPB.com) -- make sure to both write them down for record-keeping and share to others in your committee so they can start making calls.**

VPB Code

Use or share this code with your phone bankers to access this Virtual Phone Bank.

D09493H-201855

Copy

OpenVPB

https://www.openvpb.com/vpb_bycode/D09493H-201855

Copy

- At the bottom of this page, you will see the User Access Panel that allows you to give specific VAN users, user groups and committees access to your list. Select the users you want to give access, and add them to the correct column. You can add the VPB with your committee by finding and adding your committee under Committee Access. Remember, when using an Open VPB link, callers without VAN accounts can also make calls as long as they have the correct code/link!

User Access (Now Optional)

Committee

Texas Democratic Party

Users with access

Nguyen, Son
 Nguyen, Son

Remove

Users without access

1, Volunteer
 Aguilar, Leslie
 Aleman, Kassandra
 API, Amicus
 API, Ballot Ready
 API, BSD DNC
 API, CallHub
 API, Civitech
 API, CTV
 API, DNC Analytics

Add

Step 5 - Preview and Save the VPB

- Once you are happy with all your settings, click Save & Preview in the Display Settings panel to preview what the phone bank will look like to your users. You can click Save just to make sure everything are saved in VAN and you have now completed the process of creating a VPB/Open VPB!

ES EN

Load To My List Send to Round 2 Restore Defaults **Save**

VPB Code

Use or share this code with your phone bankers to access this Virtual Phone Bank.

2C9493B-984389

Copy

Display Settings **Save & Preview**

Customize the layout and information displayed on your Virtual Phone Bank.

> Basic Demographics

- You can now get back to this page to manage the VPB under the Administrative Menu -> Phone Services -> Virtual Phone Bank. To choose which VPB to make edits to, simply search and click on the specific Name of the VPB on the page.

My Voters My Campaign

Search for a page

Home Main Menu Voter Contact

PEOPLE

Create a List My Folders My List (496 People) Quick Look Up

DATA ENTRY ORGANIZING REPORTING

Administrative Menu

Polling Locations State Updates

> Reports • Forms • Labels

> MiniVAN

> Exports

> Letters • Emails

> **Phone Services**

RoboCalls RoboSurveys Recordings RoboSurvey Scripts RoboCall Accounts **Virtual Phone Bank** Predictive Dialer Campaigns

What is the event scheduler and how do I include it in my phone bank?

Understanding event scheduler

- If you are an **organizer or an admin**, you may want to call and recruit volunteers for your event/campaign (like when your VPB is in My Campaign and you are inviting people to an event using a texting app such as Hustle). By using the Event Scheduler, you can ensure that both you and the person you are contacting know when they are supposed to come to your event, and also schedule them directly into a volunteer shift while phone banking with them.

- If you are a **volunteer** who is phone banking, you may want to recruit other volunteers or to get people to come to your campaign's event. By using the Event Scheduler, you will help your campaign keep track of rosters and follow up with people you have contacted.

Adding event scheduler to my phone bank

- The event you are scheduling should already be created in My Campaign before you set up the VPB (or before you add Event Scheduler to the VPB).
- Check the *Include Event Scheduler* box and select the date range and event types that will be shown to callers.
 - Some filters of events available are fundraiser, phone bank, training, voter registration, etc.
 - Some filters of roles available are attendee, data entry, canvasser, organizer, etc.
 - Remember that the more event filters you select the narrower the list of events shown to your callers..
 - You can create multiple filters of events and roles all on the same page. Simply click next to the entry you just created and the drop down menu will appear again for you to select. This is useful for when you know precisely the type of event you will use to schedule events.

▼ Events

Enable event scheduler to enable callers to schedule contacts for upcoming events. Adjust the event filters narrow the list of events shown to your callers on Virtual Phone Bank and WrapOpenVPB.

Event Scheduler ☒ Include Event Scheduler

Event Date ^{*} ⓘ 3/15/2020 to 3/21/2020

Event Type Phone Bank X Community Event X

Event Role Phonebanker X Attendee X

Event Status ^{*} ⓘ Scheduled X

What about using MobilizeAmerica?

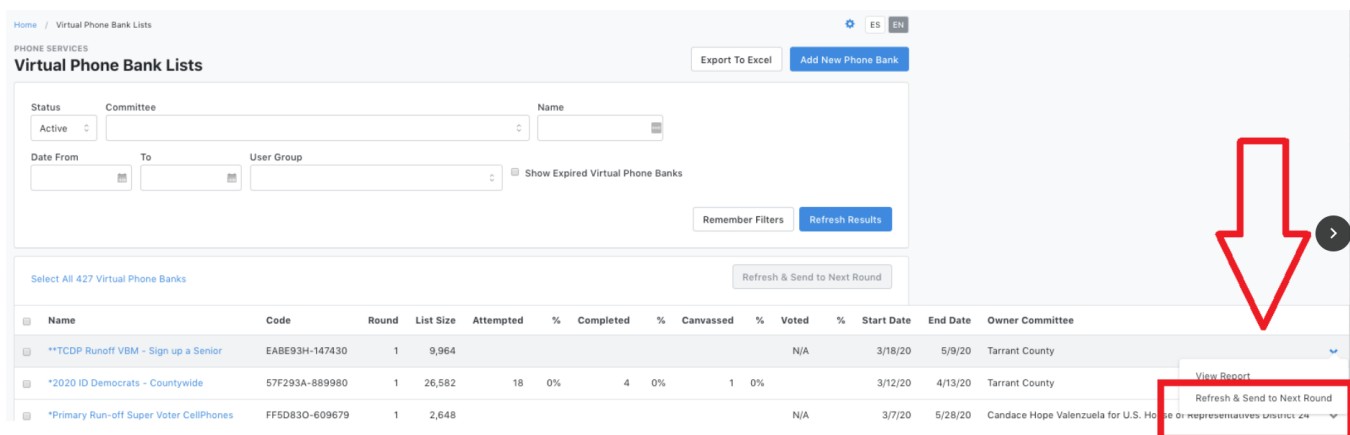
- One alternative (**especially in OpenVPB where event scheduler is not available**) is using [*MobilizeAmerica*](#) to schedule people. *Mobilize* will automatically add the person to the event in My Campaign, and it will

automatically send out reminders before the event. Manually added people will also require manual reminders.

- We recommend that callers have the event open in a separate browser tab in *Mobilize*, and then they can input the person's data there. This will generate an immediate confirmation to the volunteer with all the event details as well.
 - This is also a great way to record contact info (especially emails) when using OpenVPB, which otherwise would not allow emails to be recorded except in Notes.
 - If your VPB is in My Voters, the system will create a record for them in My Campaign if there isn't one already. However, when using Hustle, the people without an existing My Campaign record will not have one created and they will not be attached to the event.

What does Refresh & Send to Next Round mean? How do I update my phone bank based on refreshing targets?

- **Refresh & Send to Next Round** will replace the existing phone bank list with the voters currently in that search. If you want your phone bank to update with the latest set of targets you will need to **refresh every morning**.
- To get to Refresh & Send to Next Round, go to Home/Main Menu, find Administrative Menu and click Phone Services and then Virtual Phone Bank. When you are in the Virtual Phone Bank Lists page, find your VPB, then scroll all the way to the right side of your screen and find the dropdown arrow that will allow you to select Refresh & Send to Next Round.



The screenshot shows the 'Virtual Phone Bank Lists' page. At the top, there are filters for Status (Active), Committee, Name, Date From, To, and User Group. Below these are buttons for 'Export To Excel', 'Add New Phone Bank', 'Remember Filters', and 'Refresh Results'. A table lists various phone banks with columns for Name, Code, Round, List Size, Attempted, % Completed, % Canvassed, % Voted, Start Date, End Date, and Owner Committee. A red arrow points to a dropdown menu on the right side of the table, which contains the option 'Refresh & Send to Next Round'.

Name	Code	Round	List Size	Attempted	% Completed	% Canvassed	% Voted	Start Date	End Date	Owner Committee
*TCDF Runoff VBM - Sign up a Senior	EABE93H-147430	1	9,964				N/A	3/18/20	5/9/20	Tarrant County
*2020 ID Democrats - Countywide	57F293A-889980	1	26,582	18	0%	4	0%	3/12/20	4/13/20	Tarrant County
*Primary Run-off Super Voter CellPhones	FF5D830-609679	1	2,648				N/A	3/7/20	5/28/20	Candace Hope Valenzuela for U.S. House of Representatives District 24

What are some other best practices for managing a phone bank?

- Make it fun!
 - Provide food and drinks.
 - Play a game -- like Phone Bank BINGO!

- Have a raffle for all participants (prizes could be a bottle of wine, free movie tickets, etc).
- Make it competitive!
 - Set up a leaderboard tracking number of calls.
 - Prize for top callers.
- Put the game on (mute)!
 - If there is a big event such as a football game -- play and mute it on TV with closed captions.