



## Keeping Your Campaign Active During Coronavirus

### [Introduction](#)

### [Native Options in Votebuilder](#)

#### [Overview](#)

#### [Creating & Setting Up a VPB](#)

#### [Making a VPB an OpenVPB](#)

### [Peer-To-Peer \(P2P\) Texting](#)

#### [Overview](#)

#### [ThruText \(Formerly Relay\)](#)

#### [Hustle](#)

#### [TextOut \(OpenProgress\)](#)

### [Paid Phone Services](#)

#### [Autodialers](#)

#### [ThruTalk \(Formerly Relay\)](#)

#### [NGP VAN Native Options \(Predictive Dialer, Robocalls, Robosurveys, Live Call Campaigns\)](#)

### [Relational Organizing](#)

#### [Reach](#)

#### [Team by the Tuesday Company](#)

#### [Outreach Circle](#)

#### [OutVote](#)



## Introduction

As campaigns move into unprecedented territory due to efforts to slow the spread of the coronavirus, we want to ensure that all of our candidates have the opportunity to continue talking to voters.

While the most influential means of direct voter contact - door knocking - is now stifled, campaigns can still utilize various tools in the progressive space to get their name and message out to voters.

The Kentucky Democratic Party (KDP) has established relationships with a number of vendors that provide services for peer-to-peer (P2P) texting capabilities, relational organizing tools, and auto-dialers to more efficiently call voters. These tools are means to provide Kentucky Democratic candidates with lower rates on services that will help you connect with voters in their communities. KDP has put together a training guide to walk you through these vendors' services and how to use them.

For access to the following services, please request these through KDP:

- GetThru (ThruTalk & ThruText)
- Hustle
- OpenProgress/TextOut
- NGPVAN Paid Phone Services
- Reach\*

**\* To load a district wide list of voters to Reach, KDP State Administrators are the only ones authorized to pull this list.**



## Native Options in Votebuilder

### Overview

A tried and true tradition in political campaigns is phone banking, which has undergone vast changes as campaigns have adapted to an electronic world.

Where campaigns would once print off call sheets of their voters and enter the data back into their own database, in today's world we are able to use Votebuilder to hone our lists and make the lists available to volunteers right on their computer.

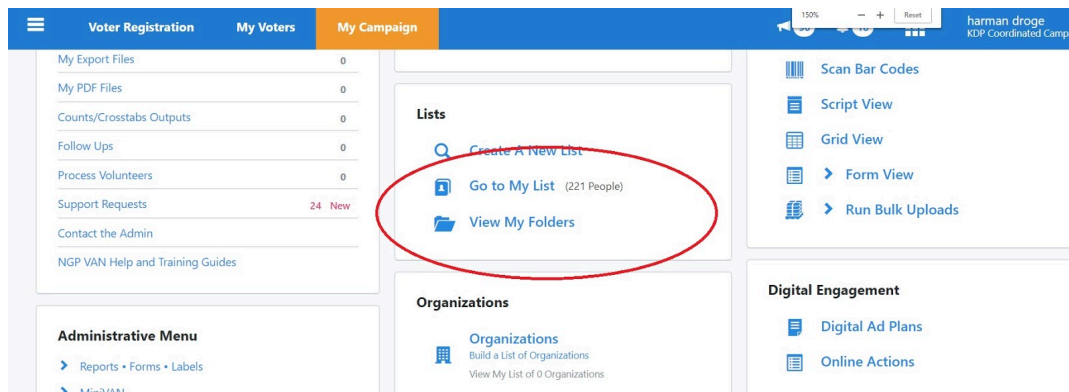
Virtual Phone Banks (VPB's) are a great and efficient way to talk to voters or volunteers over the phone without having to worry about entering any data.

VPB's can be shared to users in your VoteBuilder (and even outside of it!) and are a productive way to reach voters in places that may not be walkable.

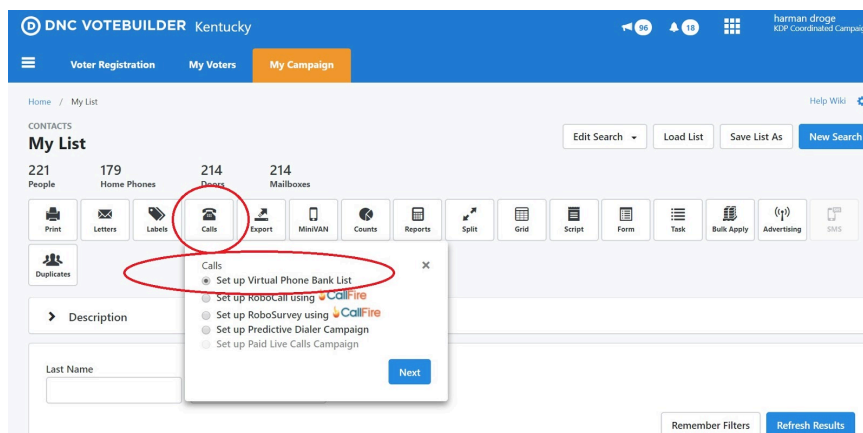
Using Votebuilder's Virtual Phone Bank (VPB) tool, we can push our list of voters to this tool to see the name and number of the voters we wish to reach out to, PLUS record the answers to the survey questions we are asking.

## Creating & Setting Up a VPB

**Step 1:** Create or find the list you want to use. You can either “Go To My List” (if it is the last list you made) or you can find your list in your Folders. Finally, you can simply “Create A New List”. Once you have selected your list you will be taken to your “My List” page.



**Step 2:** Select the “Calls” button and select “Set up Virtual Phone Bank List”.

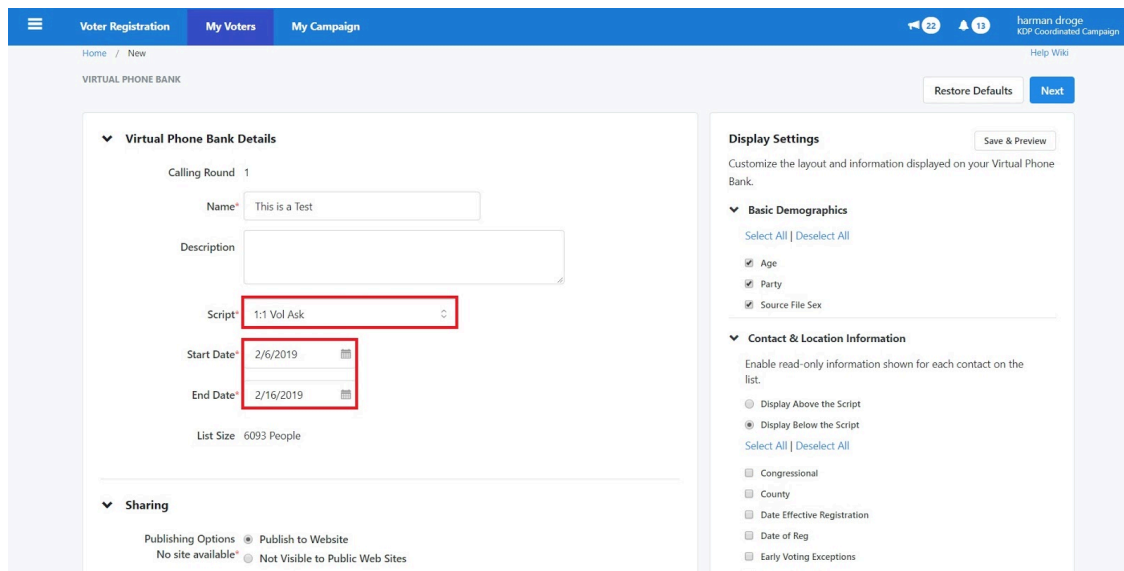


**Step 3:** Name, add your script and set the dates of the VPB. For naming your lists - whether they are VPB's, call sheets, walk sheets, or MiniVAN lists - the standard scheme is:

CountyName\_PctName/Number Activity\_MMDDYY

Fayette\_A101 Walk\_040819

Jefferson\_C101 Phone\_040819



**Virtual Phone Bank Details**

Calling Round 1

Name\* This is a Test

Description

Script\* 1:1 Vol Ask

Start Date\* 2/6/2019

End Date\* 2/16/2019

List Size 6093 People

**Display Settings**

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

☐ Congressional

☐ County

☐ Date Effective Registration

☐ Date of Reg

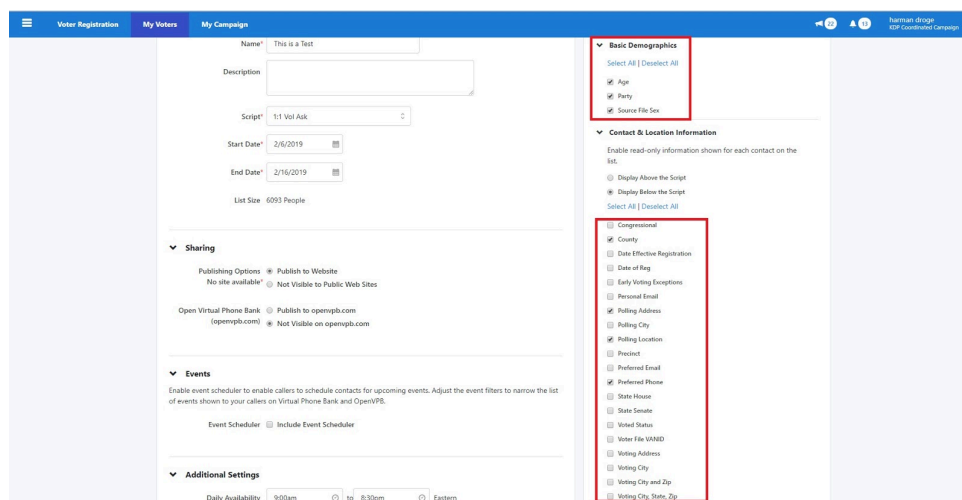
☐ Early Voting Exceptions

**Sharing**

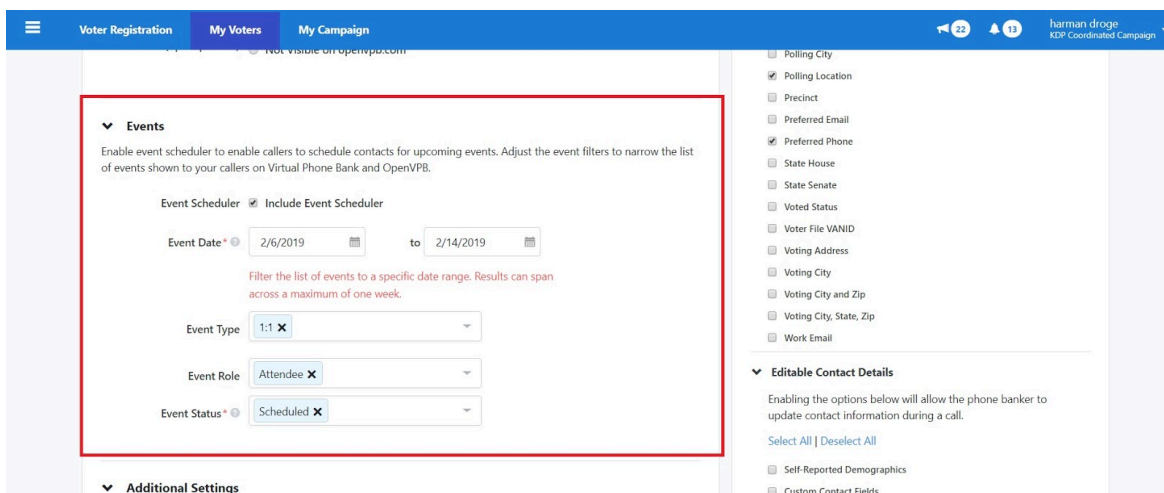
Publishing Options ☒ Publish to Website

No site available\* ☐ Not Visible to Public Web Sites

**Step 4:** Select the details about the voter you'd like on the page your volunteers will see. (We recommend Age, Party, Sex, Polling Location, County, and VAN ID for most races)



**Step 5:** If you are in MyCampaign and you are inviting your list to an event, make sure to add “Event Scheduler” for ease of data entry in scheduling people to the event.



**Step 6:** Make sure to set times for when the VPB can be used so volunteers cannot call “after hours”. Also, Select “Show only people in Household from Virtual Phone Bank list” to set everyone with



## Keeping Your Campaign Active During Coronavirus

the same number or address in the list to be on the same page so you do not call the same location or phone multiple times in your phone bank.

The screenshot shows the 'My Campaign' section of the KY Democrats campaign management interface. The 'Additional Settings' section is expanded, showing various configuration options. The 'Daily Availability' is set to 9:00am to 8:30pm Eastern. The 'Householding' section has 'Show only people in Household from Virtual Phone Bank list' selected. The 'Progress Bar' section has 'Show Entire Phone Bank Progress' checked.

**Additional Settings**

- Daily Availability: 9:00am to 8:30pm Eastern
- Standard Time
- Time Limit: Minutes
- Contact Limit: Successful Contacts
- Repeat: ☐ Allow users to repeat session
- Distribute Contacts: ☐ Distribute voters by zip code
- Householding: ☒ Do not display Also in Household  
☒ Show only people in Household from Virtual Phone Bank list  
☐ Show all Also in Household
- Alternate Numbers: ☒ Don't attempt alternate numbers  
☐ Attempt all alternate numbers
- Skipping: ☐ Allow users to skip contacts and households  
☐ Exclude anyone who has Early Voted or Absentee Voted  
☐ Exclude anyone who has voted on Election Day
- Status: ☒ Active ☐ Inactive

**Additional Contact Details**

- ☐ Self-Reported Demographics
- ☐ Custom Contact Fields
- ☐ Addresses
- ☐ Salutation
- ☐ Phones
- ☐ Email
- ☒ Contact History
- ☒ Notes
- ☐ Tags

**Progress Bar**

Customize the progress bar on your Virtual Phone Bank to show progress through your list.

- ☐ Show Individual Progress
- ☒ Show Entire Phone Bank Progress

**Step 7:** Hit Next on the top right then simply add people at the bottom of the next page to give them access to the phone bank or have them enter the “VPB Code” in the Virtual Phone Bank section of the main menu.



## Keeping Your Campaign Active During Coronavirus

The screenshot shows the 'User Access (Now Optional)' section of the KY DEMOCRATS interface. At the top, there's a navigation bar with 'Voter Registration', 'My Voters', and 'My Campaign'. The 'Committee' dropdown is set to 'KDP Coordinated Campaign'. Below this, there are two columns: 'Users with access' and 'Users without access'. In the 'Users without access' column, 'Auderdale, Colin' is highlighted in blue. A red arrow points from this user to the 'Add' button at the bottom of the 'Users without access' list. The 'Add' button is also highlighted with a red box. Below the user lists, there's a 'User Group Access' section with a 'Committee' dropdown set to 'KDP Coordinated Campaign'.

**Step 8:** Choose to set up the Virtual Phone Bank as an “Open VPB”, allowing you to send links to people outside of Votebuilder to help make calls into your VPB. **NOTE: The callers who receive these links do not need Votebuilder accounts to use an Open VPB.**

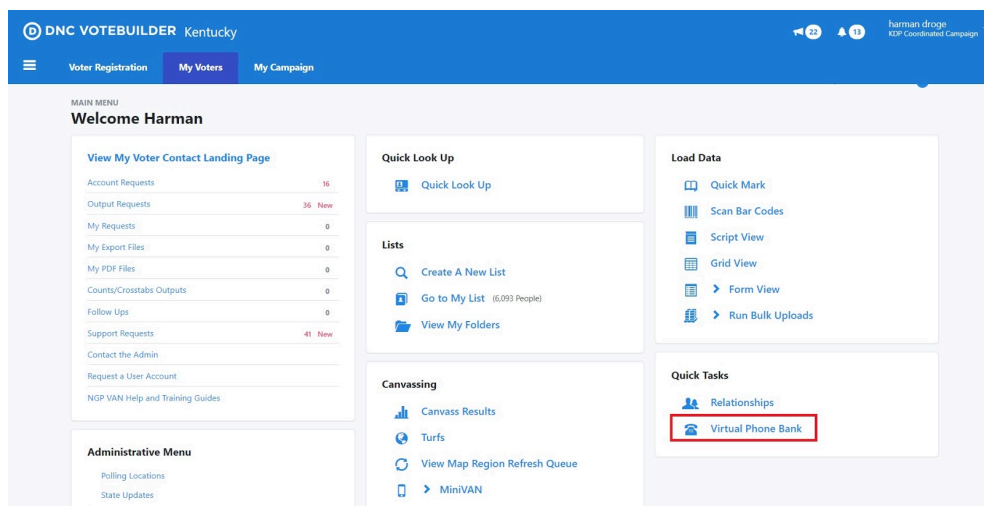
The screenshot shows the 'DNC VOTEBuilder Kentucky' interface for setting up a 'VIRTUAL PHONE BANK'. The page title is 'This is a Test'. On the right, there are buttons: 'Load To My List', 'Send to Round 2', 'Restore Defaults', and a 'Save' button highlighted with a red box. Below these buttons, there's a 'VPB Code' section with the code 'A5B2F2K-487021' highlighted in a red box and a 'Copy' button. Below that, there's an 'OpenVPB' section with a URL 'https://www.openvpb.com/vpb\_bycode/A5B2F2K-487021' highlighted in a red box and a 'Copy' button. On the left, there's a 'Virtual Phone Bank Details' section with fields for 'Name\*' (containing 'This is a Test'), 'Description', and 'Script\*' (containing '1:1 Vol Ask').





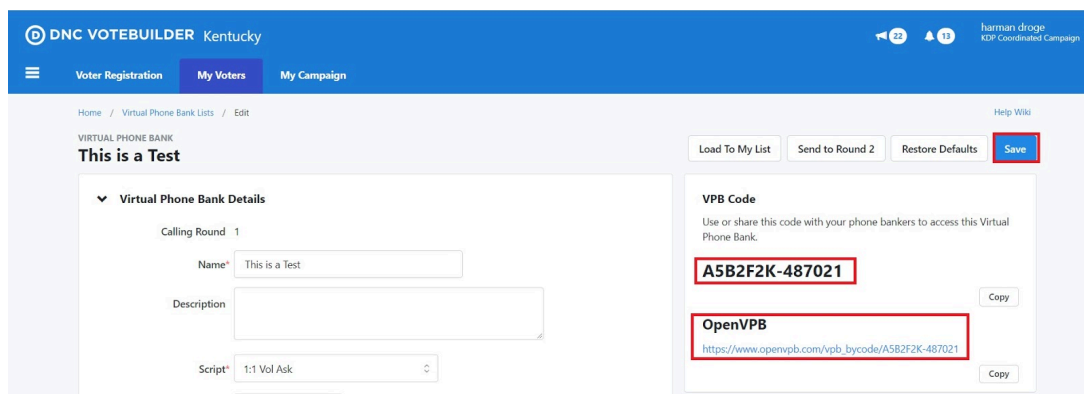
## Keeping Your Campaign Active During Coronavirus

**Step 9:** Congratulations! You've created your Virtual Phone Bank and can start making calls! Go to the "Virtual Phone Bank" link in the bottom right of your screen, click it, and the VPB you just created should show in your list!



### Making a VPB an OpenVPB

If the VPB was set up correctly using the above steps (specifically **Step 8**), you can take the OpenVPB link and send it to your volunteers to begin making calls WITHOUT having to set them up with a Votebuilder account.





## Keeping Your Campaign Active During Coronavirus



## Peer-To-Peer (P2P) Texting

### Overview

A recent advent over the past few cycles is the use - and growth - of peer-to-peer (P2P) texting in campaigns. While a large number of vendors exist in the progressive space, the State Party has existing agreements with several vendors where we can shift the savings to campaigns.

The three vendors we have State Party Agreements with are:

- ThruText (formerly Relay)
- Hustle
- TextOut (Open Progress)

For see our best practices and a sample texting script, please visit [this link](#).

To view our **BUDGET CALCULATOR** for texting services, please visit [this link](#).

**For setting up P2P services, please allow 1-3 business days for all steps to be completed, including: activation and set up, agreements and contracts, and API integration. All campaigns that purchase a P2P service through KDP will receive an onboarding training administered by KDP and have the VAN API Integration established upon their account being set up.**



## **ThruText (Formerly Relay)**

Pricing:    \$.08/Outbound SMS Text  
              \$100 Set Up Fee

Built by progressive campaign professionals and used widely in 2018 and 2019, ThruText has features comparable to Hustle. With ThruText, you can use an API to send lists to the platform and assign multiple Votebuilder Activist Codes/Survey Questions to your campaign to sync back results to Votebuilder. Administrators can create their scripts, add users, and assign texting campaigns to their volunteers right in their computer browser. Volunteers, meanwhile, can text voters right from their computer screen OR on their smartphone's internet browser.

To begin the setup process for ThruText, please visit [this link](#).

For setting up your texting campaigns in ThruText, please visit [this link](#).

For preparing your volunteer texters, please visit [this link](#).

## **Hustle**

Pricing:    \$.08/Outbound SMS Text  
              \$100 Set Up Fee

One of the most widely recognized P2P vendors, Hustle allows you to directly send your list from Votebuilder to Hustle's system, and sync results back to Votebuilder, via an API. Administrators can create their scripts with a single Votebuilder Survey Question, add



users, and assign texting campaigns to their volunteers right in their computer browser. Volunteers, meanwhile, can text voters from where it seems most natural - from their smartphones (via the Hustle app).

To begin the setup process for Hustle, please visit [this link](#).

For setting up your texting campaigns in Hustle, please visit [this link](#).

For preparing your volunteer texters, please visit [this link](#).

### **TextOut (OpenProgress)**

Pricing:   \$.07/Contact Uploaded for 6 segments (160 characters = 1 segment). After 6 segments, overage charge of \$.025/message.  
\$50 Set Up Fee

Like other vendors, TextOut uses an API to send lists to the platform and assign Votebuilder Activist Codes/Survey Questions to your campaign to sync back results to Votebuilder. TextOut possesses a much more robust options for data collection and scripting. Administrators can create their scripts, add users, and assign texting campaigns to their volunteers right in their computer browser. Volunteers, meanwhile, can text voters right from their computer screen.



## Keeping Your Campaign Active During Coronavirus

One new feature of TextOut is their Import Contacts workflow, which will provide an estimate of how much texting that list will cost.

To begin the setup process for TextOut, please visit [this link](#).

For setting up your texting campaigns in Textout, please visit [this link](#).

For preparing your volunteer texters, please visit [this link](#).

\* Please note that the TextOut User Interface/Experience will require time to get used to, and may not seem as User Friendly to some.



## Paid Phone Services

### Autodialers

For autodialers, capacity is the key to how many calls will be made. Some dialers will still make calls with a small amount of volunteers on but it is suggested that you have at least six volunteers on at the same time to go into predictive dialer mode.

### ThruTalk (Formerly Relay)

Pricing:               Set Up→ \$100  
                              Price Per Dial → \$.05

Built by progressive campaign professionals and used widely in 2018 and 2019, ThruTalk's dialer is the only dialer in the market that can *legally* call cell phones. Administrators will export and bulk upload the list they want to call, and ThruTalk Support Team verifies if a number is a landline or cell phone. Administrators build out their script in ThruTalk and can make it dynamic based upon the answers received from the voter, and those answers sync back to VAN via API. Callers log-in online, sit back and wait for calls; during calls, callers mark the appropriate responses on screen and the system does the dialing for them.

To begin the setup process for ThruTalk, please visit [this link](#).

To view our **BUDGET CALCULATOR** for ThruTalk, please visit [this link](#).



**For setting up ThruTalk, please allow 1-3 business days for all steps to be completed, including: activation and set up, agreements and contracts, and API integration. All campaigns that purchase ThruTalk through KDP will receive an onboarding training administered by KDP and have the VAN API Integration established upon their account being set up.**

NGP VAN Native Options (Predictive Dialer, Robocalls, Robosurveys, Live Call Campaigns)

Pricing: For further information on pricing please click [HERE](#).

Predictive Dialer Price Per Dial → \$.14/minute/user

Robocalls Charge Per Number, Per Length of Recording → \$.01/0-15 seconds | \$.013/16-30 seconds | \$.016/31-45 seconds

Robosurveys Charge Per Contact → 1st Question < 30 seconds = \$.05/contact | 1st Question < 60 seconds = \$.07/contact. Scripts with additional questions, each additional completed question = \$.03

Live Calls Campaigns (from a Call Center) → \$24/hour

NGP VAN's internal system, everything will occur within Votebuilder and be similar to a VPB - except for the system that will make calls for you. Administrator level users (Level 1) can set up these services within their committee. Can only call the landlines within your universe.





## Keeping Your Campaign Active During Coronavirus

Other NGP VAN services include Robosurveys, Robocalls, and Live Call Campaigns. All these can be activated and utilized by Committee Administrators.



## Relational Organizing

### **Reach**

Reach helps campaigns take the voter file\* with them in a handy app, allowing the campaign to connect with voters where they are.

Tabling at a farmer's market and someone expresses interest and support for the candidate? You can 'canvass' them right there on the spot using Reach! After a member of your team connects with that person, they can directly follow up via text or email straight from the app!

As more individuals use Reach within your campaign, their actions feed into a leaderboard to track who is getting the most of certain metrics like ID's, volunteers, and taking actions! Want to talk smack with the rest of the folks after learning you're at the top of the leaderboard? There's a Team Chat for that!

Pricing is based upon the size of your district, with local races consisting of 150K voters or fewer. To enable the API Integration between Reach and Votebuilder, that will cost "Local" Campaigns \$150/month.

\* Please note that to get the entire Voter File over to Reach, only the KDP's State Admin has permission to export the entire voter file. Once a request has been made to use Reach, we will export and directly upload the file to Reach on the campaigns behalf. \*

## **Team by the Tuesday Company**

Similar to other relational organizing tools in the marketplace, Team by the Tuesday Company creates a digital community for your campaign where you can connect with supporters and empower them to be trusted messengers. All in a way that your campaign can track.

Using a multi-faceted approach, Team is focused on:

- Digital Organizing & Community: With a direct line of communication to volunteers and supporters, Team is able to help staffers build community and distribute ownership of the campaigns organizing program to supporters. Staffers are able to build long-term one-on-one relationships with supporters in order to recruit and mobilize them to take action in their own communities.
  - Similar to traditional voter contact (door knocks, calls made, volunteer shifts recruited), Team allows you to track your supporters' digital actions including content shared, messages sent, and survey responses returned.
- Direct Relational Outreach: With Team, the campaign can upload their targets to the system and can match these targets with your supporters' contacts list. Utilizing existing relationships, your supporters can now reach out to their personal network through their preferred method on the campaigns behalf to be trusted messengers.
- Organic Message Amplification: Team allows supporters to share content about the campaign with their network on



social media. Compared to ads, organic Facebook posts are prioritized and delivered with greater social trust.

## Outreach Circle

Pricing (with a six-month subscription):

List Size	Cost Per Month	Total Cost
<50K	\$30	\$180
50-150K	\$150	\$900
150K-300K	\$300	\$1800
300K-500K	\$500	\$3000

**\*\*\*\*\* If your campaign decides to use Outreach Circle, please use the code `KYDems` at checkout to receive a 10% discount for being referred to the platform by KDP \*\*\*\*\***

Built with relational organizing in mind, Outreach Circle helps your supporters get their friends, neighbors, and colleagues involved with your campaign - on their own schedule.

Using Outreach Circle, the campaign can upload a list of voters to the platform and as supporters create accounts, their personal networks will be matched to those voters to determine who in their network is in the district. From there, your supporters can reach out to their network on your behalf (with your approved messaging) through email, text, and social media.



With a two-way VAN API, you can pull over your voter file from Votebuilder into Outreach Circle and map the responses you get back into Votebuilder.

## **OutVote**

OutVote helps campaigns turn their supporters into organizers, allowing them to volunteer from home. Supporters can do traditional peer-to-peer organizing and interactions with their friends and colleagues (including Friend-To-Friend texting) as well as distributed organizing by looking up folks they may be meeting in OutVote's sync of the voter file. The information that supporters gather syncs back into the campaign, allowing them to know who supporters have talked to and what the reaction was. In addition, it creates a digital community for your campaign where you can connect with supporters and empower them to be trusted messengers.

For Friend-To-Friend texts, supporters use their own phone to text and does not have a cost; for traditional peer-to-peer texting done inside the platform, the cost is \$.05/outbound.