

Fundraising Phone Bank Work Flow

Introduction

Phone Banks are set up and operated via the Survey section of the Campaign menu of PowerBase.

The basic work flow of Phone Bank is this:

1. Configuration

- a. Determine if this will be collecting Donation or Membership payments and configure the button.
- b. Determine which fields should appear in the pop up when you mouse over a record in the survey

2. Set up the Survey type of Phone Bank

- a. Add questions as custom data or reuse prior custom fields
- b. Put them on a profile or reuse a prior profile.
- c. Add them to the Phone Bank Survey
- d. Determine a “Result Set” and add it to the Phone Bank Survey

3. Create Group(s) to be interviewed

4. Prepare for volunteers

- a. Add survey to a menu
- b. Create volunteer logs in and assign them to a special permission group of PowerBase Phone Bank
- c. Train the volunteers and staff that will be calling

5. Start Calling

- a. Using your new Survey, reserve contacts from the Group for each caller
- b. Caller logs in, makes calls and enters responses, including credit card payments
- c. Automatically release any reserved contacts after a day so they can be assigned again tomorrow.

6. Monitoring

- a. Use Activity and/or Survey reports to track who has not been called.
- b. Use Contribution Reports to check on receipts

7. Evaluating

- a. Contribution Reports for dollars
- b. Membership Reports for member renewals
- c. Activity and Survey reports for number of calls made

Phone Bank

Introduction

Phone Banks are set up and operated via the Survey section of the Campaign menu of PowerBase. Survey is a general term used in PowerBase for the module that handles creating questions and collecting answers from a population. Surveys are used for a variety of purposes, such as collecting opinions, fundraising, and they even can be used for getting commitments to attend one or more upcoming events. Survey is not designed to serve as an online survey form. For that, one would use a custom profile or even a petition.

Survey permits you to allocate (reserve) contacts to individuals who will then call or visit the contact, interact with them, and record a result. If you are recording results online, you can directly link to a page to record a contribution or membership renewal for the contact. You can update information, such as phone numbers, directly in the contact record as well as record answers to the survey. Once a contact is reached and a result recorded, the contact will not be included in a call list for that survey again. You can automatically remove the reservations of uncalled contacts on a daily basis so that the next night's volunteers can try to reach that contact again.

While this document will focus on phone banks, the same approach can be used for walk lists and other types of surveys.

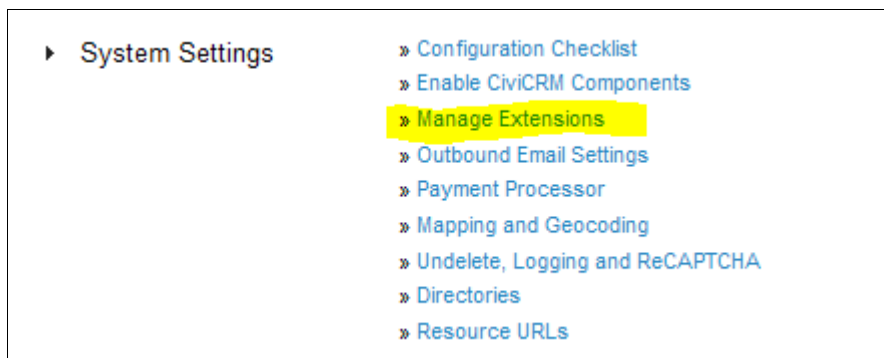
Setup Configuration

Membership or Contribution links

Phone bank can be set up so that each row in the survey has a link to the contact's contribution or membership renewal page. Clicking on it opens a tab to the correct page for the contact. This speeds up recording payments while the contact is on the phone with the caller.

One time setup

Before using this function the first time, a PowerBase Administrator has to install the extension. To do so, go to **Administer>Administration Console**. In the System Settings section, **Select Manage Extensions**.

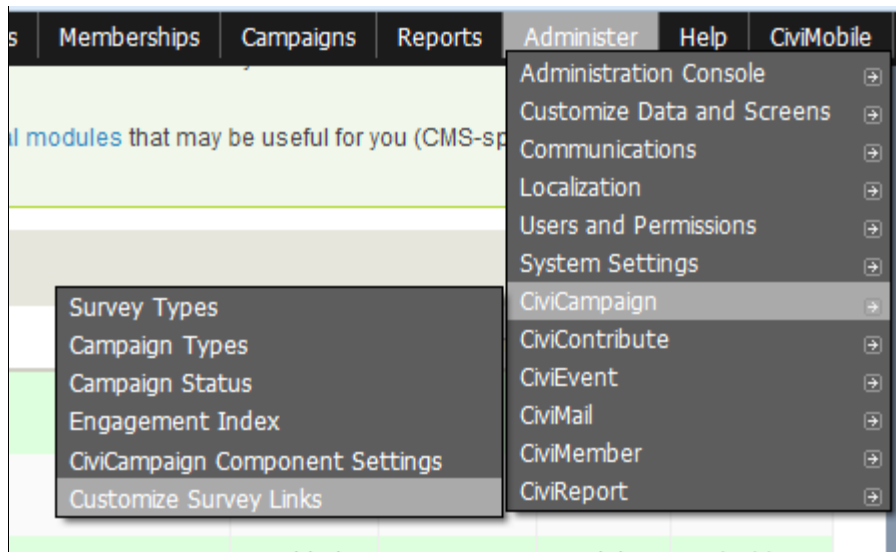


Select **Install** on the **Survey Links** row.

Phone Bank

► Survey Links (net.ourpowerbase.surveylinks)		0.1	Module	Install
---	--	-----	--------	---------

Once this is completed, the links can be turned on or off as needed. That is done via the **Administer>CiviCampaign>Customize Survey Links** option.



You can set the link type that you want here. Select whether the link will be to the membership or contribution contact page. Note: Once you select a link, it will appear on ALL surveys, until you set it back to - no links -

Survey Links

Survey Links Settings

The Survey Links extension allows you to place links on the survey data entry screen to each contact's contribution tab or membership tab. Please indicate below whether you want a link added, and if so, which one.

Link Type - no links -

Save

- no links -
membership
contribution

Access Keys: ?

Summary Overlay

There is a handy feature called the Summary Overlay that is helpful for working with phone banks.



It's a pop up screen that appears when you mouse over the person icon on the phone bank list. It also works on the Search Results lists.

Phone Bank

Advanced Search

▸ Edit Search Criteria ?

277

Beatrice Ameduri

Sel

Constituent Type

Potential Member

Donor Current Level

Phone (Primary)

330-555-3766

Donor Solicit?

Home Phone

330-555-3766

Donor Category

Home Mobile

Donor Allegiance

A

Home Address

950 Cornell St

Last Contribution

25.00

Rese

City

Youngstown

Date of Last Contribution

January 1, 2013

☐

State

OH

Total Contributions

50.00

☐

Zip

44502

Total Contributions this Year

25.00

☐

Primary Email

abc2533@example.com

Total Contributions last Year

0.00

☐

Best time to Contact

Date of the last attended event

☐


Issues Interest

Last attended event

☐

Donor Ask Level

☐

 Ameduri, Beatrice

950 Cornell St

Youngstown


OH

44502

330-555-3766

Potential Member

☐

 Amoline, Danielle

9067 N Girdle Rd

Middlefield

OH

44062

999-150-2013

Constituent

The benefit of this is that the person calling does not need to go to another screen to get detailed information on contact. You can see that there is a lot of space here for putting in information you will need as the call progresses. We've edited this example to put in items that are not in the default version.

You can edit the field list that go on this page by going to **Administer>Customize Data and Screens>Profiles**. Select the **Reserved Profiles** tab. Select Fields on the Summary Overlay row.

			Directory	
Summary Overlay	Individual, Contact	7	Standalone Form or Directory	Fields Preview more ▶

You can add or subtract fields from here. It's okay to delete or disable them. Adding or subtracting fields from a profile to not change the underlying data, i.e. they are non-destructive.

Phone Bank

Setup the Phone Bank Survey

Here's what a phone bank looks like when someone is calling through their list.

Record PhoneBank Responses

Call members to ask for additional donations on the year end.

Click record response button to update values for each respondent as needed.
Click Release Respondents button below to release any respondents for whom you have forwarded a response.
Click Release More Respondents button if you need to get more respondents to interview.

Columns: Order: Respondent Name Ascending Order By

Show 10 entries

Name	Primary Phone	Home Phone	Donor Age Level	Donor Objective	Preferred Language	Which event can you attend	Next Steps	Note	Result	Record Response
Adam, James Contributor	330-555-1231	330-555-1231		- select -	English (United States)	<input type="checkbox"/> Connecting <input type="checkbox"/> Done	Left Message Send F/U email Remove from Call List Move - Update Data Wants to be more active		- select -	Record Response
Adam, Amanda Contributor	330-555-1232	330-555-1232		- select -	English (United States)	<input type="checkbox"/> Connecting <input type="checkbox"/> Done	Left Message Send F/U email Remove from Call List Move - Update Data Wants to be more active		- select -	Record Response
Adam, Adam Contributor	330-555-1233	330-555-1233		- select -	English (United States)	<input type="checkbox"/> Connecting <input type="checkbox"/> Done	Left Message Send F/U email Remove from Call List Move - Update Data Wants to be more active		- select -	Record Response
Adam, Adam Contributor	330-555-1234	330-555-1234		- select -	English (United States)	<input type="checkbox"/> Connecting <input type="checkbox"/> Done	Left Message Send F/U email Remove from Call List Move - Update Data Wants to be more active		- select -	Record Response

The first column is the icon. Hovering over it with the mouse will bring up the summary overlay. Next is a column with the name which is automatically added to the profile, and below it is the link to record a contribution page for the contact. This is automatically created if the Survey Link has been defined. To the right of the name are fields that come from the contact record and were placed there by the survey creator. Note that some of them are editable so the data in PowerBase can be changed on the fly. The right hand section after the Preferred Language column contains the fields that are the actual “questions”, that is, the information that we are specifically seeking from the contact via this survey. These answers will be recorded in an activity record of the type PhoneBank.

Questions are not required for a survey. Sometimes the remaining columns collect all the information you are interested in.

The last three columns: **Notes**, **Results** and **Record Response** are automatically created by the survey record. The caller calls the phone number of the contact and holds a conversation or gets voice mail. The next steps field is recorded. The Result is marked as Completed and the caller clicks **Record Response**.

To create a phone bank survey like this, go to **Campaigns>New Survey**. You'll get the screen below.

Phone Bank

The Main Information Tab

The screenshot shows the 'New Survey' form. At the top, there are 'Continue >>' and 'Cancel' buttons. Below them is a green banner with the text: 'Use this form to Add new Survey. You can create a new Activity type, specific to this Survey or select an existing activity type for this Survey.' The form fields include: 'Title' (text input), 'Campaign' (dropdown menu with '- select -' and a 'new campaign' link), 'Activity Type' (dropdown menu with '- select -'), 'Instructions for interviewers' (a rich text editor with a toolbar and a 'body' label), 'Maximum reserved at one time' (text input), 'Total reserved per interviewer' (text input), 'Release frequency' (text input), 'Active?' (checkbox, checked), and 'Default?' (checkbox, unchecked). At the bottom, there are 'Continue >>' and 'Cancel' buttons.

Put in the **Title**, select a **Campaign** and select the **Activity** type of PhoneBank.

You can fill in optional **instructions for interviewers** that will appear on the phone bank page.

The **Maximum reserved at one time** field holds the maximum number of contacts that can be reserved at any one time to be interviewed. Generally leave this blank.

The **Total reserved per interviewer** is the maximum that can be reserved for any particular interviewer.

Release Frequency is the number of days that a reserved contact is allocated to an interviewer. If the interview with the contact is not completed or released before this time is up, the reserved contact is released so that it can be allocated to another interviewer. Generally set this to 1, for one day.

Active? Check this box to make this an active survey.

Default? Check this box to make it the default. It's convenient to have the default selected when you are reserving respondents later.

Phone Bank

The screenshot shows the 'Configure Survey - Spring Phone Bank' interface with the 'Main Information' tab selected. At the top, there are four buttons: 'Save', 'Save and Done', 'Save and Next', and 'Cancel'. Below these, the 'Title' field is set to 'Spring Phone Bank'. The 'Campaign' dropdown is set to 'Annual Membership Meeting', with a link to 'new campaign'. The 'Activity Type' dropdown is set to 'PhoneBank', with a link to 'select the Activity Type'. A rich text editor for 'Instructions for Interviewer' contains the text: 'We're calling to get links to come to the Annual Membership Meeting. Please see who is coming to the Saturday meeting and the Dance Saturday night!'. Below the editor are fields for 'Maximum reserved at one time' (set to 25) and 'Total reserved per interviewer' (set to 25), with a link to 'Maximum total number of contacts that can be in a reserved state for an interviewer'. There is also a 'Release frequency' field set to 1, with a link to 'Reserved respondents are released if they haven't been surveyed within this number of days. The Respondent Processor script must be run periodically to release respondents. [Learn]'. At the bottom, there are checkboxes for 'Active?' (checked) and 'Default?' (checked), with labels 'Is this survey active?' and 'Is this the default survey?'. The same four buttons ('Save', 'Save and Done', 'Save and Next', 'Cancel') are at the bottom.

Click **Continue**.

The Questions Tab

The blank Configure Survey Questions Tab appears with places for two profiles.

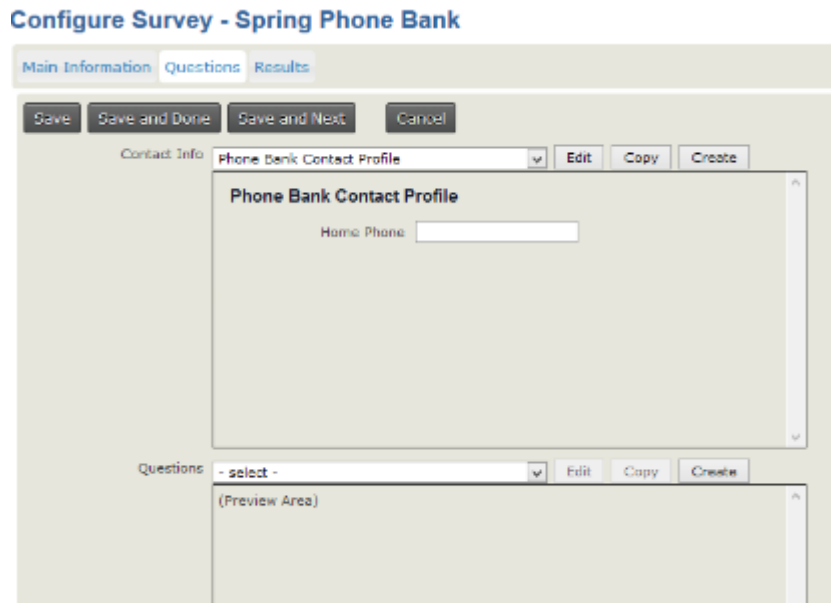
The screenshot shows the 'Configure Survey - Spring Phone Bank' interface with the 'Questions' tab selected. At the top, there are four buttons: 'Save', 'Save and Done', 'Save and Next', and 'Cancel'. Below these, there are two sections: 'Contact Info' and 'Questions'. Each section has a dropdown menu set to '+ select +', and buttons for 'Edit', 'Copy', and 'Create'. Below each dropdown is a large text area labeled '(Preview Area)'. At the bottom, there are four buttons: 'Save', 'Save and Done', 'Save and Next', and 'Cancel'.

The idea for this page is that you will put the profile that holds the contact fields in the upper section. Select an existing profile in the field next to **Contact Info** to **Edit** or **Copy** or click **Create** to make a new one.

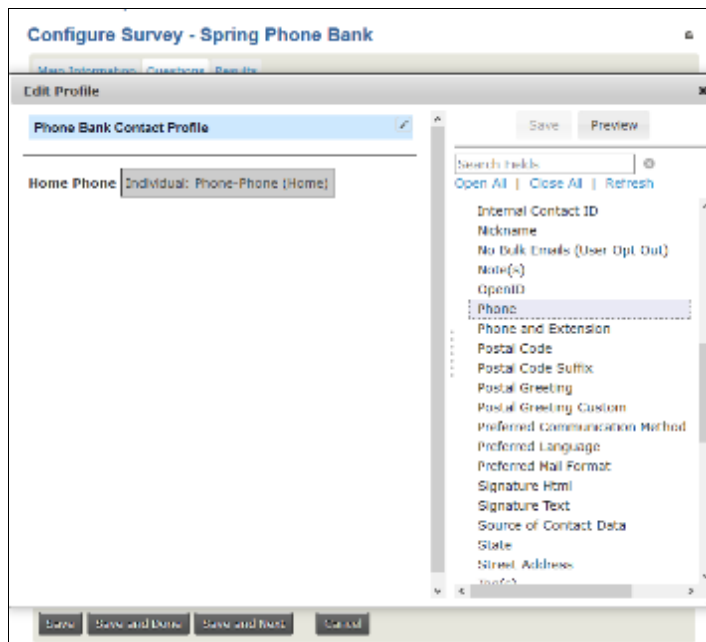
Phone Bank

The Contact Info Profile

We've select the **Phone Bank Contact Profile** that was created earlier.

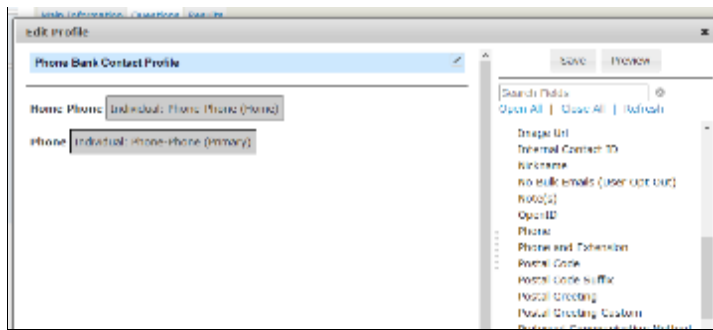


We'd like to edit this profile to have more information and phone numbers. The contact name will appear by default so you needn't add that. We click **edit** to go the profile edit screen. This opens up a window over the survey. In the left window we have the fields currently in the profile. In the right hand window the potential additional fields appear. If we click on the plus sign by **Individual**, we get a list that looks like this screen:

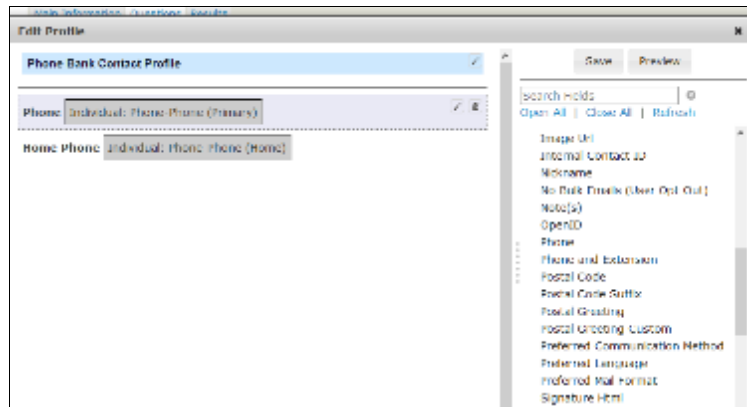


Find phone number on the list and drag it over to the left window. It defaults to the Primary Phone, which is okay, but we'd like it to be first on the list. Just click on it and drag it up.

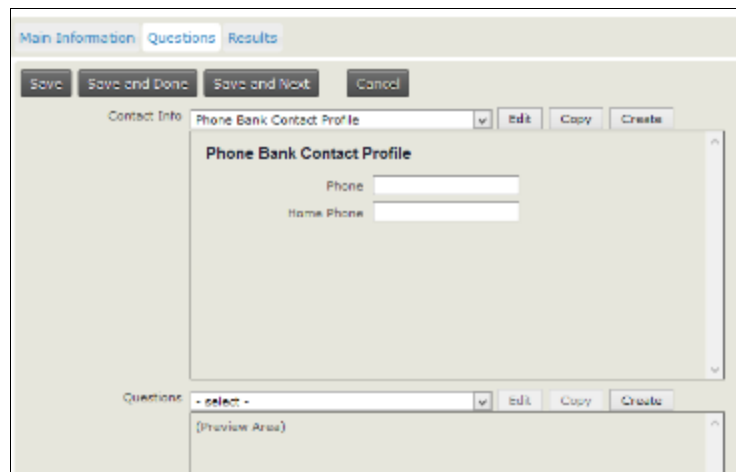
Phone Bank



We see that Primary Phone has moved into place. Clicking on the field also displays the pencil icon – which allows us to edit the field and the label – and the trash can which allows us to remove it from the profile.



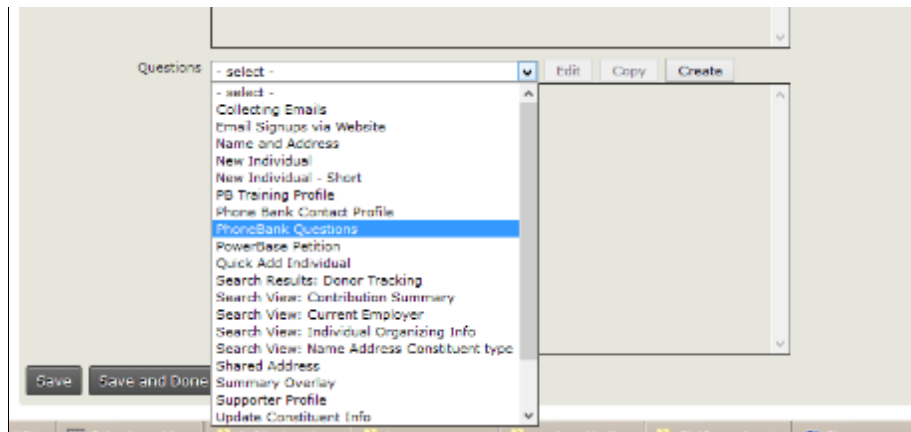
When we're done editing, click on the **Save** button in the upper right corner of the overlay window. We're returned to the original Questions tab, but now our upper window's profile has been changed to add the field.



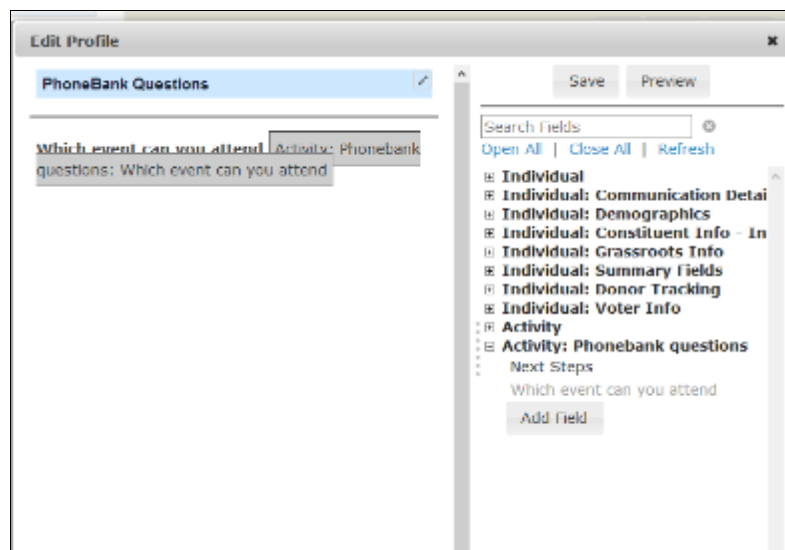
The Questions Profile

In this section you can also edit or copy an existing profile or create a new one. In this example, we going to use an existing one called *PhoneBank Questions*.

Phone Bank



We have a situation similar to what we had before: two windows, profile on the left, fields to select from on the right.



Since these are the questions and questions are stored as a special activity type of PhoneBank, expand the **Activity: Phonebank questions** to get a list of possible fields. If we don't see the one we want, new fields can be added right on this screen. This process has the same result as adding them through the Customize Data and Screens>Custom Fields option on the Administer menu. The new fields created here will be new custom fields in your PowerBase. It's not a good idea to add new fields without discussing it with your colleagues or without checking to make sure they are not already in the PowerBase somewhere else.

We've got a field that's called *Next Steps* that we want to add to the survey. It is a field designed to capture the intermediate term actions someone should take with this contact after the survey is completed. Drag it over and it becomes part of the PhoneBank Questions profile.

Phone Bank

The screenshot shows a configuration window titled "PhoneBank Questions". On the left, there are two sections: "Which event can you attend" with the activity "Phonebank questions: Which event can you attend" and "Next Steps" with the activity "Phonebank questions: Next Steps". On the right, there are "Save" and "Preview" buttons at the top. Below them is a "Search Fields" box with "Open All", "Close All", and "Refresh" links. A list of fields is shown, including "Individual: Communication Detail", "Individual: Demographics", "Individual: Constituent Info - In", "Individual: Grassroots Info", "Individual: Summary Fields", "Individual: Donor Tracking", "Individual: Voter Info", "Activity", and "Activity: Phonebank questions". At the bottom right, there are "Next Steps", "Which event can you attend", and "Add Field" buttons.

Click Save in the upper right hand corner of the window overlay to close it and continue from the Questions tab.

The screenshot shows the "Training" Survey Dashboard. A "Configure Survey - Spring Phone Bank" window is open. At the top, there is an "Unsaved Changes" warning: "Your changes to 'PhoneBank Questions' have not been saved. Restore unsaved changes". The window has tabs for "Main Information", "Questions", and "Results". Below the tabs are "Save", "Save and Done", "Save and Next", and "Cancel" buttons. The "Contact Info" section shows "Phone Bank Contact Profile" with "Edit", "Copy", and "Create" buttons. Below this is a "Phone Bank Contact Profile" form with "Phone" and "Home Phone" fields. The "Questions" section shows "PhoneBank Questions" with "Edit", "Copy", and "Create" buttons. Below this is a "PhoneBank Questions" form with "Which event can you attend" (radio buttons for "Convening" and "Dance") and "Next Steps" (a list box with "Invite to Join Donor Committee", "Send P/U email", and "Wants to be more active"). At the bottom are "Save", "Save and Done", "Save and Next", and "Cancel" buttons.

PowerBase reminds us to save our work, we are done with the profiles anyway, so we click **Save and Next**.

Phone Bank

Results Tab

Configure Survey - Spring Phone Bank

Main Information Questions **Results**

Survey Responses * ☐ Create a new result set ☒ Use existing result set
You can create new result options for this survey, or select an existing survey result set which you've already created for another survey.

Select Result Set:

Result Options

Enter up to ten (10) multiple choice options in this table (click 'another choice' for each additional choice). You can use existing result set options by selecting survey result set.

Default	Label	Value	Recontact Interval	Weight
<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[another choice](#)

Create Report

Create Report ☒

Report Title

Save Save and Done Save and Next Cancel

The Results tab holds all the values for the Results field. Every survey has a results tab. It has several functions:

- It can close the phone bank for this contact and mark it complete so that they will not get called again.
- As it closes the survey for this contact, it can track statuses of the survey that can be used for follow up actions
- It can release the contact from the phone bank and allow another person to call again later.

Begin by selecting existing an existing Result set and modifying it for your needs.

Configure Survey - Spring Phone Bank

Main Information Questions **Results**

Survey Responses * ☐ Create a new result set ☒ Use existing result set
You can create new result options for this survey, or select an existing survey result set which you've already created for another survey.

Select Result Set:

Result Options

Enter up to ten (10) multiple choice options in this table (click 'another choice' for each additional choice). You can use existing result set options by selecting survey result set.

Default	Label	Value	Recontact Interval	Weight
<input type="radio"/>	Completed	C		1
<input type="radio"/>	Not Home	NH		2
<input type="radio"/>	Moved	MV		3
<input type="radio"/>	Wrong Address	WA		4
<input type="radio"/>	Wrong Number	WN		5
<input type="radio"/>	Deceased	DE		6
<input type="radio"/>				

[another choice](#)

Save Save and Done Save and Next Cancel

Phone Bank

The **Recontact Interval** is the number of days to wait before this contact can be contacted for this survey. If it's set to blank or zero, the contact is taken out of the survey pool once the result is recorded. In some cases, that may not be the desired result. Take "Not Home" for example. If the desire is to call the "Not Home" folks back, then setting a number of 1 will make them available to be called the next day. Setting it to 7 will delay it for a week. They will not be taken out of the pool.

Weight controls what order they appear in on the list.

You are not restricted to these results. Imagine a phone bank that was designed to simply find out if the contact was supporting a specific position of the organization. The result set could be Yes or No or Declined to Say. It's good to include the other more general options as well. Phone calls are a good time to clean up the database so using the opportunity to record who moved, bad phone numbers and deceased are perennial result options. The organizer of the phone bank can query the survey results and pull up a list by these statuses or any of the other questions fields.

Create Report option defaults to yes. A report will be created for this survey with the name of the survey. You can override the name by filling in the **Report Title** field.

Clicking Save and Next will bring you back to the original Main Information tab. **Click Save and Done** to end the survey editing.

Reserving Respondents

Reserving respondents assigns contacts to an interviewer. When the interviewer logs in to start calling, this is the list of contact that will appear. Respondents will stay reserved until the interviewer calls them or they are manually or automatically released.

Assuming that you've prepared a group of contacts that you are targeting for the phone bank, and that you know who is going to do the calling, the best practice is to reserve them for each caller before the interviewer is waiting to get started.

Pay attention to the release frequency that you've set for this phone bank. If you've set a release frequency of a day, and you reserve them for a phone bank tomorrow, they'll all be released before you get started. To get around that, set the release frequency to a longer period of time so that you have time to get ready for your callers or just reserve them the same day they call.

Go to **Campaigns>Reserve Respondents**.

A screenshot of a web application interface titled "Find Respondents To Reserve". The form is divided into several sections. On the left, there are input fields for "County", "City", "State", "Zip", "Phone", and "Email". In the center, there are dropdown menus for "Interviewer" and "Status", and a "Select" button. On the right, there is a "Campaign" dropdown menu. At the bottom, there is a "Create" button. The form is set against a light beige background with a subtle grid.

Phone Bank

Pick the **survey** that you want.

Pick the **interviewer**. The default will be for yourself unless you change it. The interviewer has to be someone in your PowerBase. It also should be someone who has a login into your PowerBase.

Pick the **group** that in which you want to reserve. Press **Search** which brings you to the search results list.

Find Respondents To Reserve

► Edit Search Criteria

444 Results Contact Type - 'Individual' ...AND...
Contacts IN FR Donors 2012

Select Records: ☐ All 444 records ☒ Selected records only

Next > Last >> Respondents 1 - 50 of 444

<input checked="" type="checkbox"/>	Contact Name	Street Number	Street Name	Street Address	City	Postal Code	State	Country	Email
<input checked="" type="checkbox"/>	Adams, Charles	610	Griffith St	610 Griffith St Apt 162	Youngstown	44510	OH	United States	abc44
<input checked="" type="checkbox"/>	Adams, Mark	3210	Flo Lor Dr	3210 Flo Lor Dr Apt 10	Youngstown	44511	OH	United States	abc55
<input checked="" type="checkbox"/>	Andrei, Helen	3000	Flo Lor Dr	3000 Flo Lor Dr Apt 10	Youngstown	44511	OH	United States	abc54
<input checked="" type="checkbox"/>	Angelo, John	541	Carlotta Dr	541 Carlotta Dr	Youngstown	44504	OH	United States	abc14
<input checked="" type="checkbox"/>	Anthonson, Marian	3037	Canfield Rd	3037 Canfield Rd Apt 1	Youngstown	44511	OH	United States	abc55
<input checked="" type="checkbox"/>	Armstrong, David	3453	Cascade Dr	3453 Cascade Dr	Youngstown	44511	OH	United States	abc19
<input checked="" type="checkbox"/>	Austgen, Helen	346	S Hazelwood Ave	346 S Hazelwood Ave	Youngstown	44509	OH	United States	abc18

Select the number you want to reserve for this person. The count may be additionally limited by the settings on the survey. Click **Go**.

This brings up the **Reserve Respondents** Screen.

Reserve Respondents

Add Respondent Reservation(s)

i Do you want to reserve respondents for 'Spring Phone Bank' ?

Number of selected contacts: 25

► Add respondent(s) to a new group

▼ Add respondent(s) to existing group(s)

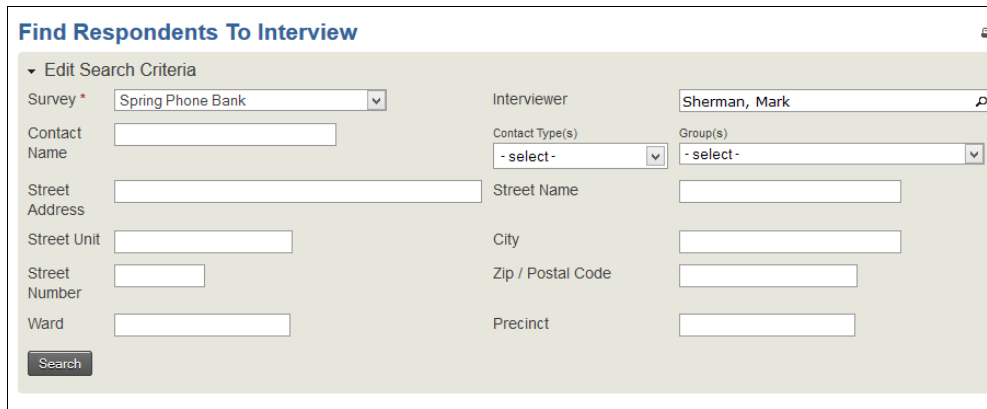
_Immigrant rights interest in 44505
FR Donor Solicitors
FR Donors
FR Donors 2011
FR Donors 2012

Phone Bank

Click **Reserve** if you are reserving for someone else. Click **Reserve and Interview** if you are reserving for yourself and ready to start.

Conducting the Phone Bank

When the time comes to interview, go to **Campaign>Interview Respondents**.

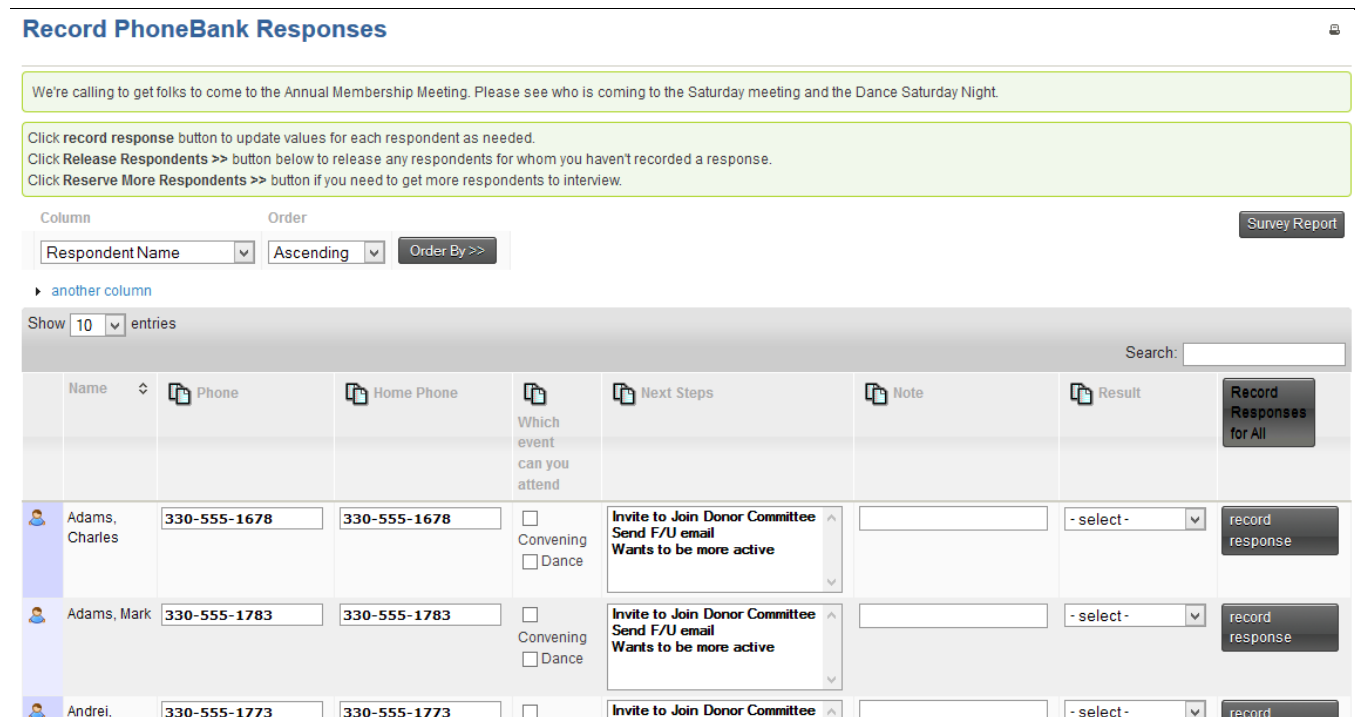


The form is titled "Find Respondents To Interview". It contains a section for "Edit Search Criteria" with the following fields:

- Survey: Spring Phone Bank (dropdown)
- Interviewer: Sherman, Mark (text)
- Contact Name: (text)
- Contact Type(s): - select - (dropdown)
- Group(s): - select - (dropdown)
- Street Address: (text)
- Street Name: (text)
- Street Unit: (text)
- City: (text)
- Street Number: (text)
- Zip / Postal Code: (text)
- Ward: (text)
- Precinct: (text)

A "Search" button is located at the bottom left of the form.

Enter the same **Survey** and **Interviewer** as before and select **Search**.



The form is titled "Record PhoneBank Responses". It contains a message box with the following text:

We're calling to get folks to come to the Annual Membership Meeting. Please see who is coming to the Saturday meeting and the Dance Saturday Night.

Click **record response** button to update values for each respondent as needed.
Click **Release Respondents >>** button below to release any respondents for whom you haven't recorded a response.
Click **Reserve More Respondents >>** button if you need to get more respondents to interview.

Column: Respondent Name Order: Ascending Order By >>

Survey Report

another column

Show 10 entries

Name	Phone	Home Phone	Which event can you attend	Next Steps	Note	Result	Record Responses for All
Adams, Charles	330-555-1678	330-555-1678	<input type="checkbox"/> Convening <input type="checkbox"/> Dance	Invite to Join Donor Committee Send F/U email Wants to be more active		- select -	record response
Adams, Mark	330-555-1783	330-555-1783	<input type="checkbox"/> Convening <input type="checkbox"/> Dance	Invite to Join Donor Committee Send F/U email Wants to be more active		- select -	record response
Andrei,	330-555-1773	330-555-1773	<input type="checkbox"/>	Invite to Join Donor Committee		- select -	record

The result is the list of people to be interviewed. The Interviewer makes the calls, selects appropriate responses including the **Result** and then clicks **record response**. Doing so releases the contact from the reserved set. If the interviewer didn't get a connection, the row can be left and it will remain in the Phone Bank. There is also an option at the bottom of the list to release all the respondents.