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## Step-by-Step Guide to Organizing a Phonebank

(Courtesy of Connie Chen, medical student and regional director for California)

Right now, more than ever, we need to make sure Congress knows that physicians overwhelmingly support the President's plan<sup>1</sup>. You and your colleagues are vital to reaching that goal. We have laid out some simple steps here to organize a phone bank from start to finish!

### **Before the Phone Bank**

- Pick an **exact time** and **location** to host your call party. This should be a place where a group of volunteers can sit together and make phone calls.

Possible locations are a living room, conference room intern/ resident lounge or even a quiet coffee shop

There should be 1) minimal background/ outside noise, 2) good cell phone reception across the major carriers, 3) sufficient space so that volunteers are not talking over each other. Internet connectivity and outlets for laptops are a plus to register new volunteers and log calls on the DFA website, as well as to access online action resources. Scope the site out before confirming the location! You do not want volunteers to gather, only to realize that the room (especially inside hospitals) is a cell-phone dead zone or that there is a lot of background noise (e.g. timing coincides with vacuuming / other noisy activity).

Survey potential volunteers to get a sense of a convenient call time. It may be advantageous to schedule the call party at a time when most people are already gathered and available (e.g. asking to do a call party in lieu of a lunch time meeting / presentation).

- Set **goals** for your call party. Do you want to:
  - Call your senators / congressional representatives
  - Call other physicians to encourage them to also speak out in support of reform (see the CIR/SEIU calling tool at [www.doctorscallingdoctors.org](http://www.doctorscallingdoctors.org))
  - Email colleagues to encourage them to engage in health care reform efforts
  - Plan other actions (such as local congressional office visits)
  - Recruit new Doctors for America volunteers (have people sign up at [www.dr sforamerica.org](http://www.dr sforamerica.org))
  - Educate physicians about current health care reform issues

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<sup>1</sup> Keyhani S and Federman A. (2009). Doctors on Coverage — Physicians' Views on a New Public Insurance Option and Medicare Expansion. NEJM. <http://healthcarereform.nejm.org/?p=1790&query=home>



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- Make creative visual displays that can be displayed in central areas (such as the physician lounge or medical school lobby). A simple example would be a poster encouraging health care providers to call their representatives in support of health care reform, listing relevant DC/ local office phone numbers.
  - Build community around health care equity
- Register your event at <http://drsforamerica.org/calendar/>
  - Recruit volunteers. Ask volunteers to RSVP and to forward the event information onwards to interested colleagues.
    1. Email Alice Chen ([atychen@gmail.com](mailto:atychen@gmail.com)) to have an email blast sent out to DFA volunteers in your geographic area
    2. Call or email your personal contacts
    3. Reach out to allied physician groups by contacting their local leadership – the American College of Physicians, American Academy of Pediatrics, etc
    4. Post fliers around your clinic or hospital
    5. Create a Facebook event
    6. If you are near a medical school, reach out to the local student community through the American Medical Student Association (Find your regional contact at <http://amsa.org/about/bot.cfm>)
  - Do reminder calls to volunteers several days in advance of the scheduled event
  - Make copies of all necessary materials (scripts, call lists). If you'd like, have some light snacks or beverages prepared.
  - In addition to the general Congressional switchboard, please have at hand phone numbers for the DC and local offices of your state senators and representatives. Make sure your phone numbers are up-to-date and functional before the start of the event.



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## Day of the Phone Bank

### Getting Everyone Started

- ❑ When each volunteer arrives, talk to him/her for a few minutes. Thank them for coming. Talk to them about the current health care reform process briefly and answer any questions they have on major issues, etc.
- ❑ When all volunteers have arrived, make sure that all volunteers have met each other and thank them for coming. Do a round of introductions, and ask people to explain briefly why health reform is important to them. Have a short 30 second story/explanation prepared yourself to jump start the conversation
- ❑ Put the event in context: After months of advocacy from grassroots groups like Doctors for America and effort and negotiations in Washington . This is the point at which it is critical that Congress hears from physicians.
- ❑ Set goals: After setting aside time for training, each volunteer should be able to make 20-30 phone calls (since a good number will be voicemails) per hour. Most lunch events will probably be only an hour long but if your event is in the evening, you should plan a break midpoint in a 2-3 hour session to tally results and celebrate successes (have volunteers share any positive conversations they may have had). You should not call later than 9:00 PM in the time zone you are calling into.

If you ask volunteers each to contact 20 or more people before they leave, this will ensure they don't talk to 3 people for a half an hour and leave. You may want to put up signs that read "Please contact at least 20 people before you leave tonight."

- ❑ Review the call materials to make sure that everyone is comfortable with the message and language. Be prepared to answer questions. It may be helpful to have you model a phone call in front of everyone. Have volunteers roleplay once or twice with each other to get comfortable with the script.
- ❑ Begin making calls! Give everyone a few minutes to try a couple of numbers and then stop to check in to make sure that everyone feel comfortable. Remind volunteers to log their calls on the DFA website.



### **During the Phone Bank**

- ❑ Once you get all the phone bankers going, GET ON THE PHONE.
- ❑ **Lead by example. If you are on the phone pounding away, that will encourage the volunteers to stay on the phone.**
- ❑ Listen to what they are saying on the phone. Don't be overly critical, but if they need some help in what to say, take a few minutes and go over the script or role-play again.
- ❑ You should not bother them for the rest of the phone bank unless they need help.
- ❑ If you run into the situation where two or more phone bankers are chatting with each other and not making calls, you should delicately try to get them back on task. First, ask them how their calls are going. They usually get the hint after that and get back on the phone.
- ❑ If it really becomes a problem and they are hindering other volunteers from getting anything done, delicately ask them how many contacts they have gotten and if they need something else to do. In subsequent volunteering sessions, put them somewhere else or ask them if they will walk instead.
- ❑ If you have a camera, take pictures!

### **After the Phone Bank**

- ❑ Thank your volunteers profusely.
- ❑ Have each person commit to another action before leaving (another phone bank, recruiting X volunteers, etc)
- ❑ Share the results of your phone bank on the DFA Facebook page + post any pictures you have



## CALLING YOUR REPRESENTATIVE – SAMPLE SCRIPT

Hello, my name is \_\_\_\_\_.

I am a doctor / medical student from (city and state, institution). I'm calling today to urge Senator/Representative \_\_\_\_\_ to support a strong health reform bill.

Having been a physician in the front lines for \_\_\_\_\_ years has made me believe firmly that that my patients (your constituents) and I need comprehensive health reform now. Insert personal story about:

- A patient who needs reform (such as a time when you wanted to give someone the best treatment but couldn't because of their insurance, or a patient who couldn't pay their deductible, or a patient who could have been treated easily had they presented earlier instead of waiting too long due to fear of prohibitive costs, or patients with easily preventable conditions that could have done better with more funding for preventive health)
- A time you have had difficulty in your role as a physician (insufficient data on comparative effectiveness of different treatment options, low reimbursement for primary care/ preventive health interventions, having to practice defensive medicine).

I need Senator \_\_\_\_\_ to fight for a bill that:

- Contains a strong public insurance option to guarantee patients more affordable choices
- Reforms payments so that physicians are rewarded for the quality of their work and the time they spend with patients
- Strengthens and expands the primary care and rural health workforce
- Creates a health insurance exchange to help individuals and small businesses buy insurance that does not deny coverage for preexisting conditions
- (any other points you wish to emphasize)

As a doctor, I need health reform urgently to help me care for my patients. Can I count on Senator \_\_\_\_\_ to work for a strong health reform bill this year?

Thank you very much!



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**CALLING OTHER PHYSICIANS – SAMPLE SCRIPT**  
MODIFIED FROM DOCTORS CALLING DOCTORS.ORG

**Introduction**

Hi, I'm Dr. \_\_\_\_\_ and I'm calling for Dr. \_\_\_\_\_. Is s/he available?

*If 'Yes' is selected, then go to **Why you're calling***  
*If 'No' is selected, then go to **Closing Script***

**Why you're calling**

Hello Dr. \_\_\_\_\_. I'm Dr. \_\_\_\_\_, and I'm an \_\_\_\_\_  
(internist/family doctor/etc.) from \_\_\_\_\_ and a volunteer with the organization,  
Doctors for America. How are you today? (Wait for a reply and engage in a conversational  
manner).

As you may know Doctors for America is the grassroots movement organizing physicians in support of health reform. Congress is deciding what to do with the bills in both the Senate and the House – bills that will provide more security and stability to those who have health insurance, provide insurance to those who don't, and lower the cost of health care for our families, our businesses, and our government.

I'm calling because I really care about health care reform. I'm sure you see the same thing I do day after day and week after week. Too many struggle with being able to afford the treatments we prescribe and that they so urgently need, and there is something you can do to help make sure we have meaningful reform for our patients this year. As a doctor, your voice is important in your community. When you talk, people listen – including your elected officials. Would you be willing to call your representatives in Congress and in the Senate, and tell them how important it is to pass health care reform this year?

*If 'Yes' is selected, then go to **Calling Congress***  
*If 'No' is selected, then go to **Closing Script***

**Calling Congress**

Great. It's easy. To be connected to your members of Congress, call the Capitol Switchboard at 866-210-3678. I'd recommend you call right away. If you get voicemail, leave a message.

Here's what you need to do:

1. **Introduce yourself.** Tell them your title and institution, but most importantly that you're a doctor on the front lines.

Last reviewed 11/4/09. Please email [info@drsforamerica.org](mailto:info@drsforamerica.org) for questions, comments, and suggestions!



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2. **Make a personal connection.**
  - a. Tell them you have patients – their constituents – who are having real problems with our health care system. Tell a story about a patient who needs reform (for example, a time when you wanted to give someone the best treatment but couldn't because of their insurance, or a patient who couldn't pay their deductible, etc. Avoid stories where the patient appears to be at fault.) Then remind them that more and more of your patients are facing problems like this, and that as a responsible physician, you can't stand by and watch good, hard working people suffer.
  - b. Tell them you (or your institution) will be able to provide better care for patients with reform.
3. **Then tell them it's critical that they vote for real health care reform this year, because our patients can't wait.** Ask them if you can count on them to support health care reform. Do you have any questions?

If 'No' is selected, then offer to send these talking points in an email, along with the phone numbers for our call center. (Exchange email, if desired.)

If 'Yes' is selected, you can feel free to answer these questions yourself. But if you don't know the answer, you can suggest they ask their members of Congress when they call.

### **Closing Script**

Doctors are key to winning health care reform. I hope you'll consider getting more involved as the fight heats up. Would you be interested in joining Doctors for America as a volunteer?

If 'Yes' is selected, direct them to [www.dr sforamerica.org](http://www.dr sforamerica.org) or ask for their email and send a follow-up email with the volunteer link

Thanks so much for your time and support! Have a good day/afternoon/evening.



Sample Tally Sheet

Date: \_\_\_\_\_  Data Transferred Script Used: \_\_\_\_\_

Total #s Dialed:	Total ANSWERS:	Left Messages:	Total "YES"s
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Volunteer's Name \_\_\_\_\_

Email Address \_\_\_\_\_@\_\_\_\_\_

Total "MAYBE"s

Can you come back to help again? Y N  
If yes, when? DATE \_\_\_\_\_ Time \_\_\_\_\_

Thanks for your help today! Your hard work is vitally important!!

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We use tally sheets like these to track the numbers of calls that are made by any volunteer on any day in any given universe. Tracking these numbers is crucial because it is how we measure our progress. It's also a great way to give volunteers a sense of accomplishment: "I made 157 calls today, and got 6 'Yes's!!"