Phone Banking Outreach Guide

Connecting people to resources and public health information

**HOW DO I SET UP A PHONE BANK?**

**Identify the goals of your outreach campaign**
What are you trying to achieve? How many people can each person reasonably reach each week?

**Create a script for the phone calls**
It provides structure for the phone conversation and helps ease the process for callers, and it can help you collect better data.

**Translate script into language(s) of your audience**
This is to make sure your outreach is culturally relevant. Test the script with respected community members and community partners before you begin.

**Set up your call list**
Create a targeted call list that is aligned with the goals of your outreach campaign. Make sure you have callers who can speak the language(s) of community members.

**Create a tracking system**
Create an easy to use tracking system to help you collect information on the result of each call and where follow-up is needed. You might set up a free Google Voice number so that you don’t have to call directly from your own cell number.

**Train your call team**
Practice the script and role-play possible scenarios.

**Conduct ongoing assessment during the campaign**
This will help you identify challenges and improvements. Talk to your call team and solicit feedback at several checkpoints.

**WHAT ARE THE BENEFITS?**

Phone banking is a method of outreach where a team of people make calls to gain supporters for an organization or campaign. It can also be an effective tool to increase program awareness or connect individuals to community resources.

This type of person-to-person contact is also an effective way to build relationships with community members. It also helps you reach those who don’t use email or text and have less access to the internet, including the elderly, homebound, and immigrant populations.

**SHOULD I HAVE BILINGUAL CALLERS?**

Depending on the neighborhoods and regions you are targeting, you may need bilingual callers. If so, create scripts in different languages, making sure they are translated accurately and are culturally relevant. Take into consideration local colloquialisms and make sure the script is simple and straightforward, with little technical jargon.
Community Spotlight

SoCal PICRT is a coalition of Native Hawaiian and Pacific Islander community-based organizations and advocates providing much-needed resources and information to communities in the cities and counties across Southern California.

Lorraine Tuala Logoai, LCSW, is a Program Manager at SoCal PICRT and shared their recent efforts at wellness phone banking, including some key strategies and lessons learned.

Who was involved in making the calls?
We partnered with the 20 faith-based organizations, local community-based organizations, and family groups. We provided training and stipends to these groups so they could call their own networks and report back to us on requests for resources and vaccine information. Then our team would call back community members who had follow-up questions.

What was the goal of your phone banking campaign in 2022?
We conducted wellness phone banking to help connect individuals with COVID-19 and other recovery resources (e.g., mental health support, PPE, food assistance) because there is so much isolation during the pandemic. And we normalized it, like checking on your aunties and uncles.

We asked each caller to set their goal of reaching 250 individuals per group. And because Pacific Islanders live in multi-family households one call counted as reaching as many as 10 people, in some cases. We wanted this to be successful for our community groups. By breaking it down this way, we made it feasible for them.

What was included in the tracker?
We created a Google doc that tracked the resources people needed across 12 categories. For every call, it was tracked, even if individuals didn't request anything. The tracker included needs such as housing, food, clothing, mental health, scheduling appointments, and financial assistance. It was also important that the tracker included a section to indicate if follow-up was needed from a community health worker. We made sure someone followed up and it was marked on the tracker.

What types of questions did you ask?
We had a script and we had a vaccine myths and facts handout which we translated into 4 languages: Chamorro, Marshallese, Samoan, and Tongan. One key question was, "Would you like more information on vaccines?" We phrased it this way so that we didn’t pressure anyone into feeling like they must get vaccinated but it allowed them to ask questions. We also asked what other resources they needed, such as food assistance, housing assistance, mental health support, and health needs.

What were some of the lessons learned?
Updating our current resource directory ahead of time or simultaneously during our Wellness Phone Banking Project would have been helpful. Ideally, community resources would be available on our website and continually updated and easy to find. Programs are constantly changing so keeping the directory updated internally was challenging.

Having materials translated in various Pacific Islander languages was very helpful. We had a toolkit with a tracker and other supporting documents. Involving trusted individuals in the community to help translate was very helpful for meaningful engagement for this project.

Additional Resources

- Solano County - "A Script for Well Checks"
- CallHub: Best Times for Phone Banking
- Tips for Phone Banking