

Steps to organize a local phone bank

(Virtual or in-person)



1. Choose a date and time

- Pick a date when most members are not working.
- For example, for Monday-Friday daytime shift workers, schedule the phone bank in the evening or on the weekend.
- Plan to run the phone bank for 1-2 hours.
 - Include a 15-minute overview of the plan for the phone bank and the script.
 - Include a 15-30 minute debrief of the calls.

2. Set Participation Goals

- Recruit 5-10 members to make calls to members, depending on the size of the local.
 - Plan for each member to make approx. 20 calls over a 1-2 hour period.
 - With a well-organized phone bank set up, 5 callers can reach even 100 members.

3. Recruit Leaders to Make the Calls

- Brainstorm a list of members that the local Executive can contact and invite to participate in the phone bank.
- Who to consider inviting:
 - friends,
 - co-workers you've worked with,
 - members who have been supported by local exec around workplace issues or grievances,
 - members who have served on committees in the past,
 - members frustrated about issues they've experienced at work, especially those listed as part of our bargaining priorities.
- Contact your leaders/callers directly by phone instead of emailing them. People are more likely to agree to participate when they receive a personal invitation.
- Explain why the phone bank is important. When recruiting, explain that:
 - The employer and government need to feel pressure to negotiate improvements to wages, benefits and working conditions.
 - The power we have as CUPE comes from majority member participation in collective action.

4. Prepare for an in-person phone bank

- If the phone bank is in person:
 - Offer food, if possible, and let members know in advance there will be food.
 - Print enough copies of the membership list.
 - The membership list should include:
 - member names,
 - work location,
 - classification,
 - cell,
 - and personal email.



BETTER SCHOOLS, BETTER TOMORROW

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DE MEILLEURES ÉCOLES, UN AVENIR MEILLEUR

- Tracking responses
 - Add a column to track members that agree to vote yes:
 - Yes
 - No
 - Maybe
 - Left message
- Assign calls:
 - Assign approximately 20 members to each caller.
 - Collect the lists back at the end of the phone bank.



5. Prepare for a virtual phone bank

- Send Meeting information - Teams or Zoom link to all recruited callers.
- Plan a Welcome and Orientation.
- At the start of the phone bank, welcome members, invite them to turn on their cameras.
- Review:
 - The plan for the phone bank
 - The calling script
 - The membership list
 - Common questions or concerns members may have and how to respond
- Before the phone bank:
 - Create a shared list
 - Upload the membership list to Google Sheets
 - Create a shareable link
 - Set permissions to "Anyone with the link can edit"
 - Add tracking columns to track:
 - The "ask": yes, no, maybe
 - Left message
 - Later, you can add another column to track whether the member followed through and signed the petition
 - Assign call lists
 - Post the Google Sheets link in the chat
 - Assign 20 calls or more to each participant
 - If applicable, rename Zoom participants based on the columns they are assigned to call or add a "Caller assigned" column to the membership list

NOTE: CallHub is a useful platform for running a local phone bank. For more information about CallHub including training please contact your area's OSBCU Mobilization Officer.

6. Conduct check-ins and debrief

Mid-point check-in:

- Reconvene approximately 30 minutes after calling begins.
- Conduct a debrief and answer questions and challenges.

7. Final debrief

Wrap up with a short discussion about how the calls went

- Always end on a positive note. You can highlight:
 - Together, they reached out to more members than an email would have.
 - They are helping to build the strength and power of their local union.