

THE COMMUNITY SURVEY TOOLKIT

A practical way to expand your footprint in your rural community.

INTRO

Campaigns come and go but good community organizing never stops.

After the 2020 election cycle, we surveyed rural leaders, candidates, and organizers to find out what they needed help with. One of the biggest asks was help with data and how to best use it in rural Tennessee.

The right data at the right time allows a campaign to punch above its collective weight. It allows local county parties to feel the heartbeat of their community.

We also know that good data is like a garden - constantly tended to. Without that care and attention, we find ourselves struggling to reach people due to outdated information and incomplete voter files.

Enter the community survey.

During the 2020 election and the months afterward, our volunteers tested using a simple community survey for outreach. This maintains accurate data on voters, trains volunteers on phone banking, and provides helpful results from the survey questions you ask.

Think of it as phone banking for candidates except with this approach, we're focused on issues and community engagement.

THE TOOLS

Here's what you'll need to get started:

- Votebuilder or equivalent CRM/Voter database.
- Volunteers
- Phones

These are just to start. You can always expand from phones to text messages and even snail mail.

THE SCRIPT

It all starts with your community survey itself. Start with outlining a few select questions that help track what your community may be feeling.

Here's the ones that worked best for our tests:

- Do you feel like your local county government represents you - that they listen to you?
- If you had a magic wand and could fix one thing in our community, what would it be?
- What should our community leaders be focused on in the next few years?

Putting those together in a contact script looks like this:

Hey there! I'm [Your Name] with [Your Organization]. We're surveying community members to see how you feel about the direction of our community. Would you have time to answer a few short questions?

If No - No worries! Would you mind if we sent you the survey via email instead? // What's the best email address to send that to?

If Yes - Great! Let's start with...

1) What's your name?

2) Do you feel like our local county government represents you - that they listen to you?

3) If you had a magic wand and could fix one thing in our community, what would it be?

4) What should our community leaders be focused on in the next few years?

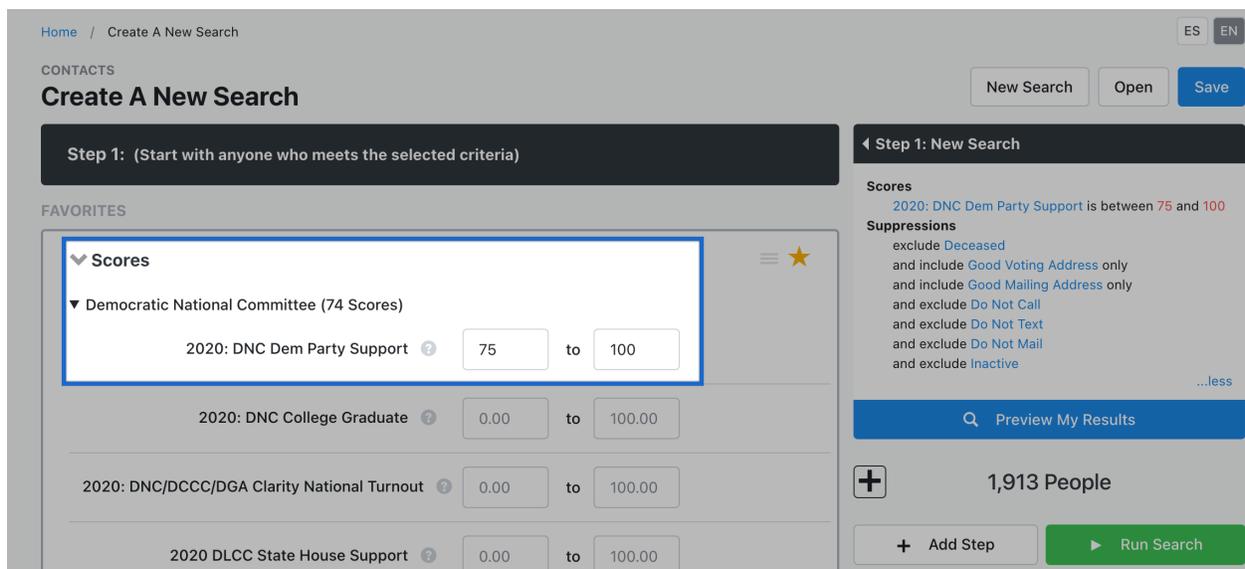
That's all the questions in our survey. Thanks so much and enjoy your [day-evening-night]!

You can tweak those to include other questions as well. For instance, if you're calling likely-Democratic voters, you may want to include a question about volunteering.

BUILDING IN VOTEBUILDER

We'll use VoteBuilder as the example since most rural organizations, especially county parties, use it. If you use a different app, the flow's likely similar but the screenshots won't match up.

For volunteers new to phone banking, it's best to start with a Dem friendly universe. In Votebuilder, pull a list of voters with a DNC score of 75-100. These should be people that voted Democratic in the last election.



You can also create a list of voters that voted in the August primary. With primaries being party affiliated, this option provides you with a list of people that voted in the Democratic primary, a guaranteed Democrat friendly universe.

If your volunteers are comfortable with phone banking, try a list of voters with a DNC score of 60-100. That'll cast a wider net into the electorate.

With your list in hand, set up a virtual phone bank (VPB) with a community survey script you prepared earlier. Here's what that sample script above would look like:

☰	1	Text	<p>Hey there! I'm [Your Name] with [Your Organization]. We're surveying community members to see how you feel about the direction of our community. Would you have time to answer a few short questions?</p> <p>If No - No worries! Would you mind if we sent you the survey via email instead? // What's the best email address to send that to?</p> <p>If Yes - Great! Let's start with...</p>	Delete Edit
☰	2	Survey Question: Does local gov't rep	Do you feel like our local county government represents you - that they listen to you?	Delete
☰	3	Survey Question: Magic Wand Questions	If you had a magic wand and could fix one thing in our community, what would it be?	Delete
☰	4	Survey Question: Comm Leaders Focus	What should our community leaders be focused on in the next few years?	Delete
☰	5	Text	That's all the questions in our survey. Thanks so much and enjoy your [day-evening-night]!	Delete Edit

Make sure to adapt this to your local community and your list specifics. For instance, if your list uses Democratic voters from the last primary election, use the survey to help recruit new volunteers and build your local party brand. If your list is wider and includes moderates and conservatives, try focusing on the community at large instead of party volunteer recruitment.

With the script in hand, set up a new Virtual Phone Bank List and plug in your details.

The screenshot shows a web interface for setting up a Virtual Phone Bank. The page title is 'Community Survey 2021'. At the top right, there are buttons for 'Load To My List', 'Send to Round 2', 'Restore Defaults', and a blue 'Save' button. The main content area is divided into two columns. The left column, titled 'Virtual Phone Bank Details', contains the following fields: 'Calling Round' (set to 1), 'Name' (Community Survey 2021), 'Description' (empty), 'Script' (Community Survey 2021), 'Start Date' (12/1/2020), 'End Date' (12/13/2020), 'List Size' (983 People), and 'Saved Search' (LC Voted Dem Primary). The right column contains two sections: 'VPB Code' with a 'Copy' button and 'OpenVPB' with a 'Copy' button. Below these is a 'Display Settings' section with a 'Save & Preview' button and two expandable options: 'Designated Contact' and 'VPB Connect'.

And that's it! Your phone bank is now live and ready to go.

WHEN TO CALL

There's a few times we've found to be effective:

- For weekdays, we recommend between 5:30pm and 7:30pm.
- For weekends, 10am to 8pm works well.
- Make sure not to call on holidays or the day right before or right after one.

Use your best judgement with these recommendations. After a few rounds of calls, you'll find which days/hours work best for your community.

LAST ODDS AND ENDS

A few assorted things to keep in mind:

- It's okay if not everyone answers the phone. Most phone bankers will only talk to about 10% - 15% of the people they dial. There's a voicemail text in the script to use for people that don't answer.
- You might be calling voters during an uncertain time. Be kind, empathetic, and understanding.
- Smile while talking, this comes across to the voter. If you are able, you can try standing up during calling to help add energy to your conversation.

TRAINING YOUR TEAM

You'll want to set up a training for your volunteers. Have them practice with their fellow volunteers, other party members, friends, etc. to start.

Once they're comfortable, set up the call times and start working on your data!

TEXTS AND LETTERS

When you run into a contact that doesn't answer the phone, you've got a few other options in your toolkit to reach them.

First up - try texting the numbers you know to be cell phones.

If you don't have a texting app set up, there's a variety of options such as Hustle.com and GetThru.io. Pricing varies as does ease of use with these.

The crew at ChangeTN.vote can also help set up a custom Spoke account at super affordable pricing - plus they're focused on Tennessee work and know the challenges of organizing in our state!

For contacts where a call and text doesn't work, try sending a letter to the contact's address. It's an effective and cheap way for that one last attempt at reaching the contact.

We've found that handwritten ones work best. Here's a sample one that we've used:

Hey there!

I'm [Your Name] with [Your Organization]. We're surveying community members to see how you feel about the direction of our community.

If you'd like to lend a hand with our survey, give me a quick call - [555-555-5555]. Or you can send in your answers on our website at [Your Organization Website]. It won't take more than a few minutes.

Thanks!

[Your Name]

NEXT STEPS

Setting up community surveys like this can be challenging. But the results are worth it!

Remember - you're not in community organizing alone. If you need help, let us know. We're great rural neighbors and ready to lend a hand!

ABOUT THE TNDP RURAL CAUCUS

We launched in early 2020 and since then, we've built an all volunteer team focused on our rural communities. We believe the more 1-1 organizing we can do, the more elections we'll win up and down the ballot here in Tennessee.

Find out more at RuralTNDems.org.