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.

	e Install
(net.ourpowerbase.surveylinks)	

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.

5	Memberships	Campaigns	Reports	Administer	Help	CiviMot	oile
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			(0110	Customize Da	ata and s	Screens	€
u n	nodules that may	be useful for y	/ou (CMS-sp	Communicati	ons		€
				Localization			€
				Users and Pe	rmission	s	€
				System Sett	ings		€
	Survey Types			CiviCampaign			•
	Campaign Typ	es		CiviContribut	e		€
	Campaign Sta	tus		CiviEvent			€
	Engagement	Index		CiviMail			€
	CiviCampaign	Component Se	ttings	CiviMember			€
	Customize Sur	rvey Links		CiviReport			€

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 -



Summary Overlay

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

B 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.

Adv	anced Search	1						
+ Ec	dit Search Criteria	9						
271	Beatrice Ameduri							
Sel	Constituent Type	Potential Member		Donor	Current Lev	vel		
	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 C	ontribution	25.00		
Rese	City	Youngstown		Date o	of Last	Janua	ary 1, 2013	
	State	он		Contrit	bution			
	Zip	44502		Total C	Contributions	50.00	1	
	Primary Email	abc2533@example.com		Total C Vear	Contributions	s this 25.00		
	Best time to Contact			Total C	ontributions	ulast 0.00		
	issues Interest			Year				
	Donor Ask Level			Date o	f the last			
				attend	ed event			
				Lasta	пенаеа ече	:15		
	Ameduri, Beatrice	950 Cornell St	Youngstown	OH	44502	330-555-3	766	Potential Member
	Amoline, Danielle	9067 N Girdle Rd	Middlefield	он	44062	999-150-2	013	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.

Setup the Phone Bank Survey

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

Re	cord Pho	oneBank	Responses										2
Cs.	members to a	sk for far addillar	al donations as the year er	nde									
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8	Adamiar, James Contribution	330-555-1251	330-555-1251		- minst - 🗤	English (United States)	y.	Convening Dance	Left Measure Senal F/LLemaal Remove from Call List Mexed: Update Data Wants to be more active		-select-	¥	Include Include
8	Adame, Amerika Contribution	330-555-1573	330-555-1673		- sdiect - 👳	English (United States)	v	Convening Convening Dance	Left Message Send F/U enail Remove from Call List Neved: Update Data Wants to be more active		- select-	×	гасого теаротан
٥	Adams, Helen Contribution	380-000-2241	330-555-2341]	-select - u	English (United States)	٧	Convening Dance	Left Message A Send F/D enail Remove from Call List Mound - Update Data Wants to be more active A		- selectr	×	record response
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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.

The Main Information Tab

New Survey	
Continue >> Cance	al de la companya de
Use this form to Add new Su	rvey. You can create a new Activity type, specific to this Survey or select an existing activity type for this Survey.
Tile *	
	Title of the survey.
Campaign	- select - w new campaign
	Select the campaign for which survey is created.
Activity Type *	-select- V
	Select the Activity Type.
instructions for interviewers	🗶 🖯 🗟 🗟 🐟 🛷 💖 - 📾 🤿 🏴 🖬 🎛 Ξ Ω 🔀 🙆 Source
	Styles * Format * Font * Size * A* M* Y
	body
Maximum reserved at one time	
maximum reserves at one time	Maximum number of contacts that can be reserved for an interviewer at one time.
Total reserved per interviewer	
	Maximum total number of contacts that can be in a reserved state for an interviewer.
Release frequency	
	Reserved respondents are released if they haven't been surveyed within this number of days. The Respondent Processor script must be n
A attes 7	pendologiry to release respondents. (learn more)
Activer	s this survey active?
Default?	
	Is this the default survey?
Continue >> Cence	

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.

Configure Survey	- Spring Phone Bank
Main Information Quest	ional Nasulta
Save Save and Don	Save and next concel
tide *	Spring Phone Bank Title of the survey.
Campaign	Annual Hondorship Macing v new company
Adivity Type *	Provedance w Scher the Accesty Types
Instructions for interviewers	
	B I U 5 X II II + + + + + + = = = = 8t/cs - Format - Fort - 8ez - ▲ ?
	body 🖌
Reximum reserved at one time.	Notice of metads that can be assessed for an intersteare at one time.
Total received per interviewer	25 Maximum total number of contests that can be in a reserved state for an interviewer.
Release frequency	t
Active?	٠. ۲
Defaultz	in that is strateging and the second of the
Save Save and Pork	Save and New Cancel

Click Continue.

The Questions Tab

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

Configure Survey	- Spring Phone Bank	
Main Information Quest	nns Results	
Save Save and Sove	Save and Next	
Contact Info	- select -	v Edit Copy Create
	(Preview Area)	* •
Questions	- select -	v Edit Copy Create
	(Preview Area)	
Save Save and Done	Save and Next 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.

The Contact Info Profile

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

Configure Survey	- Spring Phone Bank		
Main Information Questi	ions Results		
Save Save and Done	Save and Next Cancel		
Contact Info	Phone Bank Contact Profile	V Edit Copy Create	
	Phone Bank Contact Profile		^
	Home Phone		
			Ŷ
Questions	- select -	V Edit Copy Create	_
	(Preview Area)		^

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:

			-
dit Profile			
Phone Bank Contact Profile	2 *	Save Preview	
	- 1	Search helds	
Iome Phone Individual: Phone-Phone (Home)		Open All Close All Refresh	
		Internal Contact ID	
		Nickname	
		No Bulk Emails (User Opt Out)	
		Note(s)	
		OpenID	
		Phone and Extension	2
		Phone and Extension	
		Postal Code Suffix	
		Postal Greeting	
		Postal Greeting Custom	
		Preferred Communication Method	l
		Preferred Language	
		Preferred Nail Format	
		Signature Html	
		Signature Text	
		Source of Contact Data	
		State	
		Street Address	

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.

edit profile	x
Phone Bank Contact Profile	Z Save Preview
Home Phone Individual: Phone Phone (Home)	Open All Close All Refresh
Phone Industrial: Phone-Phone (Phone)	Drieger United Trieferreit Constanten 1D Nickensen No Bulk Emails (USER Opt Out) NOCO(2) OppenD Plane
	 Photos and Extension Postal Code Postal Code suffic Postal Code suffic Postal Code suffic
	Postal Creeting Castom

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.

Fdlt Profile		
Phone Bank Contact Profile	2	Save Preview
Phone Individual: Phone Phone (Primary)	Z III. Open A	Heids 0 I Close Al Refresh
tome Phone [Jidwdual: thone there (Home)	The second secon	ge UH Imail Upritact up Iname Balk Drusik (User Opt Out) (5) Inami Inami Extension Inami Extension Inami Extension Inami

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.

Main Information Questions Results									
Save Save and Done	Save and Done Save and Next Cancel								
Contact Info	Phone Bank Contact Profile v Edit Copy Create								
	Phone Bank Contact Profile								
	Phone								
	Home Phone								
Questions	- select - v Edit Copy Create								
	(Preview Area)								

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*.

						~
		_		_	-	1
Questions	- select -	÷	Edit	Copy	Create	
	- select -	~				<u>A</u>
	Collecting Emails					
	Email Signups via Website					
	Name and Address					
	New Individual					
	New Individual - Short					
	PB Training Profile					
	Phone Bank Contact Profile					
	PhoneBank Questions					
	PowerBase Petition					
	Quick Add Individual					
	Search Results: Donor Tracking					
	Search View: Contribution Summary					
	Search View: Current Employer					
	Search View: Individual Organizing Info					
	Search View: Name Address Constituent type					×
	Shared Address					
Save Save and Done	Summary Overlay					
	Supporter Profile					
_	Update Constituent Info	~				

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

Edit Profile	×
PhoneBank Questions	Save Preview Search fields O Open Al Close Al Refresh # Individual: Communication Detai Individual: Comographics # Individual: Constituent Info - In Individual: Crassroots Info # Individual: Constituent Info - In # Individual: Voter Info # Individual: Voter Info # Activity: Phonebank questions Next Steps Which event can you attend Add Field

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.

PhoneBank Questions	Save Preview
Which event can you attend Activity: Phonebank questions: Which event can you attend Next Steps Activity: Phonebank questions: Next Steps	Search Fields Open All Close All Refresh Individual: Communication Detai Individual: Constituent Info - In Individual: Constituent Info - In Autividual: Donor Tracking Individual: Donor Tracking Individual: Voter Info Activity Activity: Phonebank questions Next Steps Which event can you attend Add Field

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

Main Information Questions Results Save and Lone Save and Next Cancel Contact Phone Bank Contact Profile	Trainin 	A Unsaved Changes * Your changes to "PhoneBank Questions" have not been saved. Restore unsaved changes
Contact Inio Phone Bank Contact Profile Phone Bank Questions Which event can youConveningDance attend Next Skeps Sind Plue mail Wents to be more active	Main Infor	aution Questions Results
Phone Home Phone Questions PhoneBank Questions Which event can youConveningDance attend Next Skeps Sind full email Wents to be more active	Contact Info	Phone Bank Contact Profile Copy Create
Questions PhoneBank Questions PhoneBank Questions Which event can you Convening Dance attend Next Steps Invite to Join Dance Committee Send I/U amai Wents to be more active		Phone Home V
v	Questions	PhoneBank Questions PhoneBank Questions Which event can you attend Next Shaps Invite to Join Dance Send f/U email Wents to be more active V

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

Results Tab

an Information Quest	ons Results				
an another and species	10000100				
Save Save and Dane	bave and N	tantel la			
Survey Responses *	O Create a ne	w result set			
	Use existing	presult set			and a should
	created for anot	her survey.	or select an easting	Leavey result set which	you ve arread
Select Republication	- select -				
Result Options					
Result Options	e choice options	in this table (click 'another choice'	for each additional	choice).You can use exis	ating result se
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Result Options Enter up to ten (10) multiplostions by reliefting survey Default Label	e choice options result set.	In this table (dick 'another choice Value	for each additional	choice).You can use exit Recontact Interval	ating result as

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.

Configu	re Survey	- Spring Phone	Bank		6				
Main Inform	mation Questi	ons Results							
Save S	Save Save and Done Save and Next Cancel								
Surve	Survey Responses * O 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.								
s	elect Result Set	Survey Default Results	Set Options 🗸						
Result O	ten (10) multiple selecting survey i	e choice options in this tab	le (click 'another choice' for each a	idditional choice).You can use exist	ting result set				
De	fault Label		Value	Recontact Interval	Weight				
0	Complet	ted	c		1				
· 0	Not Horr		NH		2				
· 0	Moved		MV		3				
• O	Wrong A	ddress	WA		4				
• 0	Wrong Number WN S								
Deceased DE 6					6				
· 0									
► anothe	ar choice								

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.

Find Res	pondents To Ress	e vie				
- boll Svar	di Criteria					
smuels.	A via plane Real	×	Internet and		sheres, net.	1
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	101	country and the rest labour.	Very other deconertation	UNC 1	OPC Deselos Natorbors	
					000 Leaders	\sim

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.

Fin	Find Respondents To Reserve								
→ E	Edit Search Criteria								
444 Sele Pri	444 Results Contact Type - 'Individual'AND Contacts IN FR Donors 2012 Select Records: All 444 records () Selected records only Print Reserve Respondents () Go								
1	Next > Last >>	Respondents 1	- 50 of 444						
•	Contact Name	Street Number	Street Name	Street Address	City	Postal Code	State	Country	Email
•	Adams, Charles	610	Griffith St	610 Griffith St Apt 162	Youngstown	44510	он	United States	abc44
•	🙎 Adams, Mark	3210	Flo Lor Dr	3210 Flo Lor Dr Apt 10	Youngstown	44511	ОН	United States	abc55
◄	🙎 Andrei, Helen	3000	Flo Lor Dr	3000 Flo Lor Dr Apt 10	Youngstown	44511	он	United States	abc54
•	🙎 Angelo, John	541	Carlotta Dr	541 Carlotta Dr	Youngstown	44504	он	United States	abc14
•	Anthonsen, Marian	3037	Canfield Rd	3037 Canfield Rd Apt 1	Youngstown	44511	он	United States	abc55
•	Armstrong, David	3453	Cascade Dr	3453 Cascade Dr	Youngstown	44511	он	United States	abc19
•	& Austgen, Helen	346	S Hazelwood Ave	346 S Hazelwood Ave	Youngstown	44509	он	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)						
Reserve Reserve and Interview Cancel						
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						
Reserve Reserve and Interview Cancel						

13 of 14

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.

Find Respondents To Interview		Ē
✓ Edit Search Criteria		
Survey * Spring Phone Bank	Interviewer	Sherman, Mark
Contact Name	Contact Type(s) - select -	Group(s) - select -
Street Address	Street Name	
Street Unit	City	
Street Number	Zip / Postal Code	
Ward	Precinct	
Search		

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

Re	Record PhoneBank Responses								
We	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 Click Click	c record respon c Release Resp c Reserve More	se button to update values ondents >> button below to Respondents >> button if y	for each respondent as ne release any respondents f rou need to get more respo	eded. or whom you ha ndents to intervi	ven't recorded a response. ew.				
Co F	lumn lespondent Na another column	Order me v Ascend	ing v Order By >>					Survey Report	
Sho	w 10 👻 entr	ies					Search:		
	Name \$	Phone Phone	The Home Phone	Which event can you attend	P Next Steps	Dote Note	Result	Record Responses for All	
8	Adams, Charles	330-555-1678	330-555-1678	Convening	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	Convening	Invite to Join Donor Committee Send F/U email Wants to be more active		- select - V	record response	
8	Andrei,	330-555-1773	330-555-1773		Invite to Join Donor Committee 🔥		- select - V	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.