



Member Engagement Guide

Introduction

This sheet should help you make the most of every time you contact your members. With limited resources and time, it is imperative that we make every contact count. We've highlighted key questions you should consider and included both little fixes and big picture adjustments that will improve your programs.

What is your goal?

When contacting members, first consider your goal in reaching out. Then consider which contact mode is going to be most successful at accomplishing that goal. Below we've organized our recommendations for how to reach your members based on your goal in contacting them. You can view our sources for these recommendations in the appendix.

Persuasion

Reaching members by mail, digital video, canvass, and phone all have their pros and cons, but are generally successful. We do not recommend using digital display ads, as they usually have little effect. Consider using a combination of tactics to reach members who inhabit different spaces and need different communication techniques.

Fundraising

Reaching members by mail, phone, email, text and digital ads all have the potential to be effective. You should find the most success by asking members to donate in the same mode in which you recruited them (email signups should get email asks, etc.).

Volunteer Recruitment

Research has shown that reaching members with a personal touch has been effective. That can mean reaching members by phone or e-mail, with that contact coming from a friend or another volunteer generating the most success. Reminding volunteers about their shifts by text has proved effective as well.

Advocacy and Action Taking

Reaching members by mail, text, phone, email, and digital ads can all be effective. We specifically recommend using patch-through calls as a way to connect members directly with decision makers.

What information should I collect on my members?

When building a list, your first interaction is your best opportunity to develop a solid membership record. The information you collect should consider the purpose of interacting with them, what mode or modes you want to use to reach them, and if they support the specific issues you are working on. While asking for more information can reduce the number of sign-ups you get, not asking for enough information can limit your organizing. Going back to a member for additional information may be less efficient than starting with quality data collection. Regardless of how you plan to contact members, we highly recommend that you collect all the information needed to match a member to the voter file including first name, last name and zip code, as well as phone number and e-mail. Collecting full address and date (or at least year) of birth will increase match rates, too. The information you have available about a new member or supporter will determine the modes of contact you can use to reach them. Keep this in mind when make choices about what you should require.

Contact Mode	Data to Collect
E-mail	Collect e-mail
Mail	Collect address
Phone Call	Collect mobile or landline phone number
Robo Call	Collect landline phone number. You cannot robo call mobile phones.
Text	Collect mobile phone number and texting permission
Canvass	Collect address
Digital	Collect e-mail, date of birth, zip

Sample Sign In Sheet

First Name	Last Name	Email	Address	Zip	Phone	Cell or Landline	Initial to opt-in to texts	Year of Birth
Jane	Doe	jdoe@gmail.com	815 16th St NW	20005	555-123-4567	cell	<i>JD</i>	1980

Things to remember: Proper training is just as important as the layout of your sign-in page. Take the time with volunteers and organizers to talk through WHY each piece of information is important to collect and roleplay frequently asked questions. The most important asset is the person holding the clipboard.

Note: This should be in Landscape page format to allow for more space. Width of columns should correspond to how much room someone would need to fill it out by hand.

What does it mean to integrate my data?

Data integration and data entry refer to making sure membership information is in the right places. If you work with a CRM and VAN and perhaps other tools like a petition site, you need to set up a plan for how often you do data entry and how often upload data.

- If you are using the VAN, set up a data entry form that volunteers can use to quickly enter new members into that can then be uploaded to your CRM
- Upload bulk files from actions like event RSVP's or petition sites to your CRM and bundle them before uploading to VAN

What messaging should I use to ID and engage my members?

Ask questions that differentiate people.

- Don't ask questions that everyone will say yes to: e.g., "Do you support women's health?"
- Ask harder questions: e.g., "Do you support a woman's right to have an abortion?"
- Offer people a range of answers: e.g. "Yes in all cases, Yes before the third trimester, Yes only in cases of rape or incest, Never, etc."

Keep it simple!

- Your script should be easy to understand and be a tool to help those using it have effective conversations. It should not be so difficult to understand that it hinders those conversations.

[Click Here](#) for access to Analyst Institute's 2016 Sample GOTV Scripts

How can I use data to inform engagement with my members?

Codes and IDs are useful tools in VAN and CRMs. Set up a clear system for what should be a survey question and what should be an activist code. Issue support is best captured with a survey question and different kinds of actions are best captured using an activist code. By separating them out, you quickly cut the most promising lists for phone banks, mailings, or other activities and you see where your supporters live down to the most local legislative level. You can use them to collect more information about your members or contacts, such as:

- How they were recruited
- What actions they have taken
- What events they have attended
- What issues they are interested in

Don't over specify.

- Generalizing on event codes and action codes makes pulling a list of all petition-signers or rally-attendees much faster
- Don't use codes that identify that they attended a specific event like 'ReproRally10.24'. Instead, use 'Rally' so that in the future, you can pull all past rally attendees and a "Reproductive Rights" survey question so you know what they care about

Don't use numbered scales without assigning meaning.

- A vague 1-10 scale or 1-100 scale without labels for what each number means are hard to interpret and may be interpreted differently by different volunteers and organizers
- Use a range of options, such as 'Strongly Agree, Somewhat Agree, Unsure, Somewhat Disagree, Strongly Disagree' instead of a 1-5 scale
- If an additional number or option doesn't mean you will have a program to treat that disposition differently, it isn't giving you value

Be consistent.

- Come up with one range of options for each question that you use organization-wide
- Building your data architecture is a way that can remain relatively consistent for both your CRM and your VAN
- Ask for the same sets of information across petitions and sign-in sheets to make data entry and matching simple
- Memorialize your questions and scales in a document integrated into training and onboarding

Thing to remember: What is the important information that you're going to use again? That is all you should be recording and collecting. A simple, easy to use data architecture makes organizing, reporting, and planning so much easier.

How can I build long-term engagement?

Engaging your new sign-ups in a timely manner and with effective messaging can help build long-term engagement. Most CRMs allow you create automated welcome emails and scheduled follow-ups. Spending a little time to make templates and automate your welcome series will incentivize you to stay on top of data entry and quickly follow-up with new members. We recommend giving an overview of the issues you care about and following up with petitions or other actions. Check out these excellent examples that Analyst Institute worked on with Texas Freedom Network, available below or in the appendix:

[On-Boarding E-mail](#)

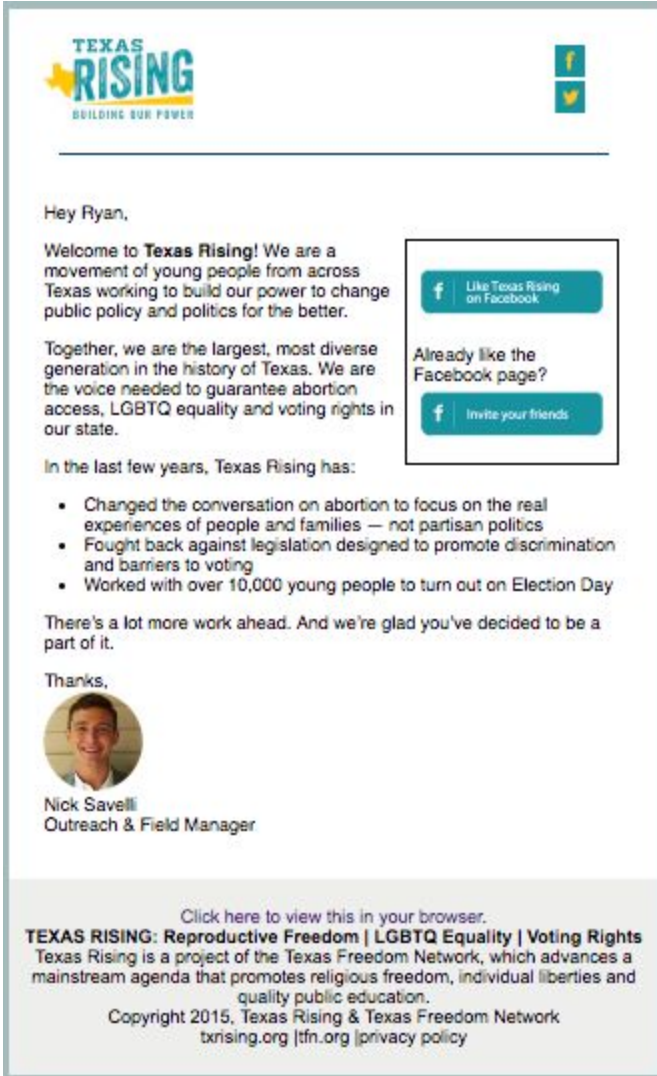
[First Action Ask, E-mail 1](#)

[First Action Ask, E-mail 2](#)

Appendix

Here are a few templates you can use for your organization's programs:

TFN On-Boarding E-mail



TEXAS RISING
BUILDING OUR POWER

Hey Ryan,

Welcome to **Texas Rising!** We are a movement of young people from across Texas working to build our power to change public policy and politics for the better.


Together, we are the largest, most diverse generation in the history of Texas. We are the voice needed to guarantee abortion access, LGBTQ equality and voting rights in our state.

In the last few years, Texas Rising has:

- Changed the conversation on abortion to focus on the real experiences of people and families — not partisan politics
- Fought back against legislation designed to promote discrimination and barriers to voting
- Worked with over 10,000 young people to turn out on Election Day

There's a lot more work ahead. And we're glad you've decided to be a part of it.

Thanks,



Nick Savelli
Outreach & Field Manager

[Click here to view this in your browser.](#)




TEXAS RISING: Reproductive Freedom | LGBTQ Equality | Voting Rights
Texas Rising is a project of the Texas Freedom Network, which advances a mainstream agenda that promotes religious freedom, individual liberties and quality public education.

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Key Takeaways:

- Description of the organization, including concrete accomplishments
- Links to social media and to invite your friends

TFN First Action Ask, E-mail 1




Jake,

Forget that abortions are a federally protected right — *right now* Texas politicians are doing everything they can to make it a service only available to rich people in the big cities.

That sucks. These attacks directly affect you, your friends and your family.

We put together a message you can fire off to the people who represent you in Austin — it'll take five seconds. [Click here to tell them, "Abortion access matters to me."](#)

In the movement,



Nick Savelli
Outreach & Field Manager

[Click here to view this in your browser.](#)



TEXAS RISING: Reproductive Freedom | LGBTQ Equality | Voting Rights
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Key Takeaways:

- Short, blunt, and to the point
- Bolded and obvious action link

TFN First Action Ask, E-mail 2



Hey Jake —

I've spent a lot of time at the state Capitol the last few months, and you wouldn't believe the utter disrespect I've heard from our so-called state "leaders." Check this out:


"We had terrorists in the Texas State Senate [supporting access to abortion]."

— State Rep. Bill Zedler

They think supporting access to legal abortion is terrorism? They don't have a clue about what our generation deals with every day.

[Speak up: we've got an email you can send to your state leaders with just a few clicks.](#) Don't stand by silently when this matters to so many of us.

In the movement,



Nick Savelli
Outreach & Field Manager

[Click here to view this in your browser.](#)

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Key Takeaways:

- Different wording and emphasis than the first ask
- Bolded and obvious action link

Sample Patch-Through Call Script

* Note: This is an example. SIP funds can only be used for c3 non-lobbying work.

Greeting/Intro

Hi, is (name) there? Hi, this is (caller) with (organization), the state-wide reproductive rights group. This is not a fundraising call. I'm calling because I need your help to ensure Governor (state governor) in (state capital) takes action on reproductive rights.

Problem

It's clear that access to abortion is at risk because of (such and such legislation) and we need to do something about it.

Urgency

Conservatives in our state will fight us tooth and nail on this, so we're generating hundreds of calls to (governor) to make sure (he/she) acts to preserve the right to abortion. It will only take a minute and it will make a big difference.

Ask

(Name), can you make a call right now?

If Yes to Patch

Great, thank you. I can patch you into (target)'s office directly in one moment. When you reach (his/her) office, please tell them your name, where you live, and that you want (target) to support women's right to abortion. You may need to leave a voicemail, which will still have a huge impact.

Before I connect you, can you please confirm that your email address is (XXXX) OR
Before I connect you, can you please have your email address?

Great, thanks, I'll patch you through right now.

If No to Patch

I understand. Can I please have your email address/confirm your email address so we can keep you updated on the campaign?

Great, thanks again for your time and your support and have a great night.

Guides on what contact modes to use:

[Persuasion](#) | [GOTV](#) | [Voter Registration](#) | [Fundraising](#) | [Volunteer Recruitment](#) | [Advocacy](#)

Note: You will need an Analyst Group login to access these documents. Anyone who works in the progressive field can become a member! You can sign up for access [here](#).