

Subject: SIP Member Engagement Guide
To: [grantee]
From: Cherie Martin, Reproductive Advocacy Program Specialist, Analyst Institute
Date: [Date]

Introduction

Building and engaging your membership is key to your organizing and power-building goals. Members identify with your organization’s mission and are more likely than non-members to take meaningful action on behalf of your organization¹. Think about building your membership as a continuous life-cycle: acquisition/list-building, identifying your members and the issues that are most important to them, engaging members on the issues that matter to them, and asking members to take escalating action with your organization.

This document aims to help you as your organization maximizes every contact and interaction with its members and supporters. With limited resources and time, it is imperative that organizers make every contact count. **We’ve highlighted key questions you should consider and included recommendations for both small fixes and big picture adjustments that may improve your programming.**



Questions? As part of the State Infrastructure Project, Analyst Institute offers one-on-one coaching for SIP grantees, and we are available to answer any questions you have about this guide or your program specifically. Please contact me at cmartin@analystinstitute.org.

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 free access [here](#).

What is your goal?

When contacting members, first consider your goal in reaching out and then consider which contact mode is going to be most successful at accomplishing that goal. Below, we’ve organized our recommendations for how to effectively reach your members based on your organization’s engagement goals.

You can view our sources for these recommendations in [the appendix](#) at the end of this document.

Voter Contact

Our findings tell us that almost all modes—phones, digital, mail, etc.—have some positive effects upon both voter [persuasion](#) and [turnout or GOTV](#). Remember that each mode’s effects are context dependent and may vary based on scalability, cost, and other factors. While all

¹ [Environment America Research and Policy Center Patch-through Call Test](#)

modes do have some positive effects on their own, you can increase the overall effect on your turnout or persuasion program by using multiple mediums within a single program or campaign to connect with members and voters, and by expanding your universe.

Fundraising

Reaching members using mail, phone, text, email, or digital modes may all prove effective. You may 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.). Visit our website to read an [overview of recent fundraising tests](#).

Volunteer Recruitment

Research has shown that reaching members with a personal touch has been effective. Meaning, for example, that a phone call or email from a friend or close contact could generate the most success, versus outreach from someone unfamiliar. Reminding volunteers about their shifts by text has proved effective as well.

Read more detailed recommendations for [volunteer recruitment on our website](#).

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](#), where contacts are recruited over the phone to call their lawmakers and then directly connected to the lawmaker's phone line, as a way to connect members directly with decision makers.

Visit our website to learn more about our [action-taking findings](#), [advocacy outcomes with policymakers](#), and [what testing can tell us about advocacy](#).

Analyst Institute Guides

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

Building your list

When building a list, the first interaction is your best opportunity to develop a solid membership record. The information you collect should consider the primary objective of your engagement with your members. For example, which mode or modes you want to use to reach them, and whether they support the specific issues you are working on. While asking for more information may reduce the number of sign-ups gained, not asking for enough information may limit the organizing tactics you can utilize post-initial engagement. Returning to a member for additional information may be less efficient than leading with quality data collection. As you implement and measure your program, you'll be able to assess what the right balance is for your organization and program.

Regardless of how you plan to contact members, we highly recommend that you attempt to collect all the information needed to match a member to the voter file. This includes first name, last name and zip code, as well as phone number and email. 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. Remember this when making choices about what information is collected.

Contact Mode	Data to Collect
<i>E-mail</i>	Collect email address
<i>Mail</i>	Collect full mailing address, including zip code
<i>Phone Call</i>	Collect mobile and/or landline phone number
<i>Robo Call</i>	Collect landline phone number
<i>Text</i>	Collect mobile phone number and texting permission/opt-in
<i>Canvass</i>	Collect voting address
<i>Digital</i>	Collect email, date of birth, zip code

Sample Sign-In Sheet²

First	Last	Email	Address	Zip	Cell Phone	Get texts from us!
Jane	Doe	jdoe@gmail.com	815 16th St NW	20005	555-123-456	<input checked="" type="checkbox"/>

Remember that 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. Even seasoned volunteers and organizers can benefit from re-training on these best practices.

The most important resource is the person holding the clipboard.

² 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.

Analyst Institute's Top 5 Data Recommendations

Data matters because it is directly connected to your ability to build power. You want to engage your members where they are and you want to win policy change to make life better for your members. Data helps you make strategic decisions for political wins. **Follow AI's top 5 data recommendations for building power and your list:**

1. **Disaggregated data collection** Collecting and organizing your data in clean formats can save time while searching and organizing your lists, regardless of what technology you use. Separating fields, such as first and last name or recognizing email addresses and phone numbers as separate data points will ensure that your lists are easily searchable.
2. **Capture data right away** The first interaction you have with a member or supporter may be the only opportunity to capture data, so make sure you are asking for vital data right away. It is almost always more difficult to go back and collect additional data later, such as cell phone numbers or email addresses. You should prioritize information that allows you to run your program. For example, if you are running a large text program, prioritize collecting mobile numbers and gaining their permission to text.
3. **Make a plan to enter data** Your opportunity to fully engage with new supporters or members may be short, so having data entered quickly, with a follow up process is vital. Have a plan to alleviate the bottleneck of data entry: who will enter data after it is collected? When will it be entered? What is the follow up for those sign ups? This is also true for data collected via online modes: how are new sign ups being added to your primary database and what follow up are they receiving?
4. **Create a simple data architecture** If your data is just a list of names and emails, you may be missing opportunities. Creating a standard set of "tags" or "codes" for supporters can help you quickly tap into your membership. For example, if you need people to show up to a last minute hearing at the Capitol, people who are tagged as "event attendee" may be the most likely to show up. Without that tag, you may utilize your list less effectively.

Additionally, if you have data being combined from multiple sources (text message program, email platform, excel documents) a data architecture can help establish basic rules to keep data organized. Do your text message lists get automatically updated as people on the email list sign up for them? Or is there a process that needs to be in place to update it? Data architecture simply ensures that people are not being lost in the cracks.

5. **Make a "data dictionary"** In the example above we mentioned the "event attendee" tag, but how do you know what that really means? What if there are other codes that look similar? Or codes that no one understands anymore? A [data dictionary](#) is a simple way of creating and maintaining definitions so that you do not duplicate or lose work, simply because you have forgotten. A dictionary can be simply an excel document that lists each field of data with a plain english description. Institutionalizing these internal systems is essential to ensuring long-term organizational continuity and success, regardless of staff movement.

Integrating your data

Data integration and data entry refer to making sure the membership information you are collecting is in the right places. Your organization likely uses a database or combination of databases to store and manage its membership data, for example EveryAction and VAN. Regardless of how and where you store your data, you will need to set up a plan to complete data entry as quickly as possible. This ensures that you have the most up-to-date information across your various databases.

- To process new data quickly, set up a data entry form that populates individual responses to a spreadsheet, such as Google Forms. This may allow volunteers to quickly transfer data from paper to a spreadsheet.
- Make use of speedy data entry tools available in VAN, like quick-mark and grid-view. Download [the most recent VANual](#) to read about these tools and others available in the VAN. Your VAN administrator can also help if you have questions that aren't answered in the VANual.
- [Upload bulk files](#) from actions like event RSVPs or petition sites to your customer relationship manager database (CRM) and bundle them together in a master spreadsheet to upload to the VAN.



Remember: Analyst Institute provides one-on-one coaching for SIP grantees to provide programmatic and data guidance based on experimental evidence. Email cmartin@analystinstitute.org for more information.

Messaging to identify and engage your members

Identifying your members is a key aspect of your data infrastructure and programming. Organizations will commonly define members as those who donate or pay dues, or those who take meaningful action. How you define membership for your organization is up to you. Identifying your members is one way to build power within a constituency and elicit more meaningful engagement—[members are more likely to take an action on behalf of your organization than non-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 specific 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. It should serve as a tool for effective conversations.
- Provide any necessary background information, like a policy one-pager or detailed talking points, on separate pages. This keeps the script simple and easy-to-read, while providing your volunteers with supplemental information and resources.

Visit our website for a [script-writing guide](#) and [2020 GOTV Toolkit](#) which includes sample scripts and other helpful turnout guides.

Using data to inform member engagement

Codes and IDs are useful tools in VAN and CRMs. Set up a clear system to consistently define survey questions³ and activist codes⁴. Issue support is best captured with a survey question and different kinds of actions are best captured using an activist code. Opinions can change, the fact that someone signed a petition does not. By separating them out, you can quickly produce the most promising lists for phone banks, mailings, or other activities. You can also see where your supporters live down to the most local legislative level. You can also 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 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 quickly.

³ A [survey question](#) is used to document your interactions with members on specific issues or campaigns. Survey questions have a set of possible responses, pre-determined by you. For example, the survey question "Do you support abortion access?" may have the following possible responses: "Yes, in all cases," "Yes, in most cases," "Undecided," "No, except in extreme circumstances," "No, never acceptable."

⁴ An [activist code](#) is used to identify someone's affiliations and interests, and can demonstrate their political leaning. Examples include: union members, petition signers, or volunteers.

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 or to describe a 1-5 scale.

Be consistent.

- Standardize the way you organize your data across systems and databases by using consistent naming conventions, tags/activist codes, and survey questions/responses.
- Build your data architecture in a way that is sustainable and can be maintained across databases, especially your main membership database or CRM and the 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.

Read more about developing a [data plan on our website](#), and check out this [example data dictionary template](#).

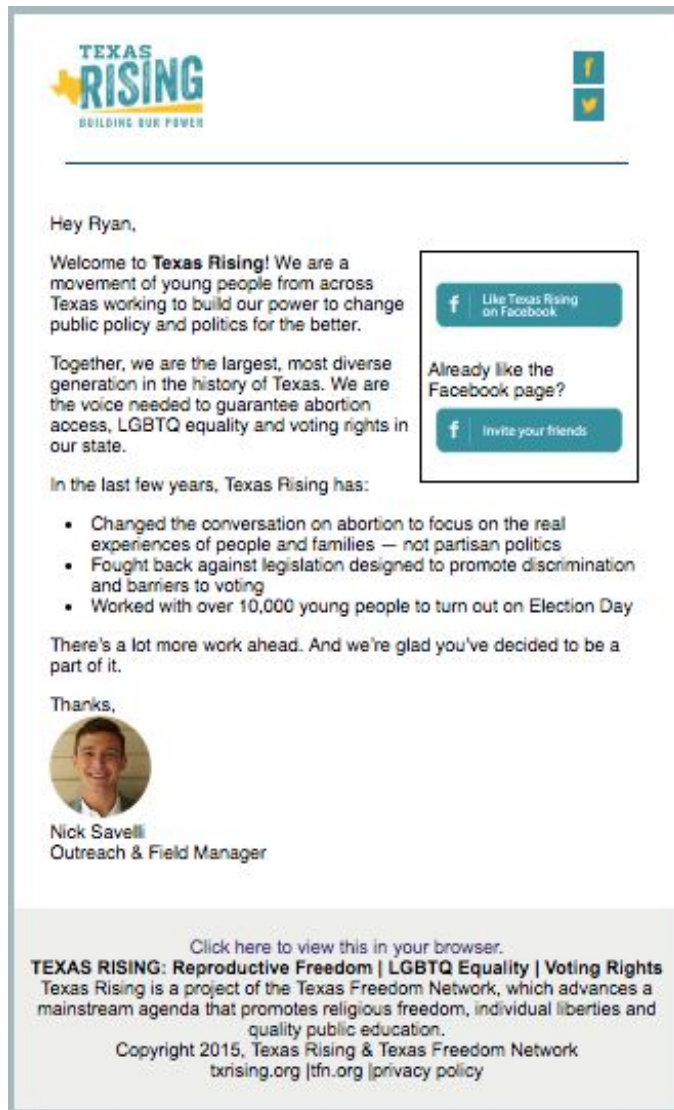
Building long-term engagement

Engaging your new sign-ups in a timely manner and with effective messaging can help build long-term engagement. Most CRMs allow you to create automated welcome emails and schedule follow-ups. You will find that investing a little time creating templates and automating 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 policy issues you care about and following up with petitions or other actions.

You can find more resources and examples in the [appendix below](#).

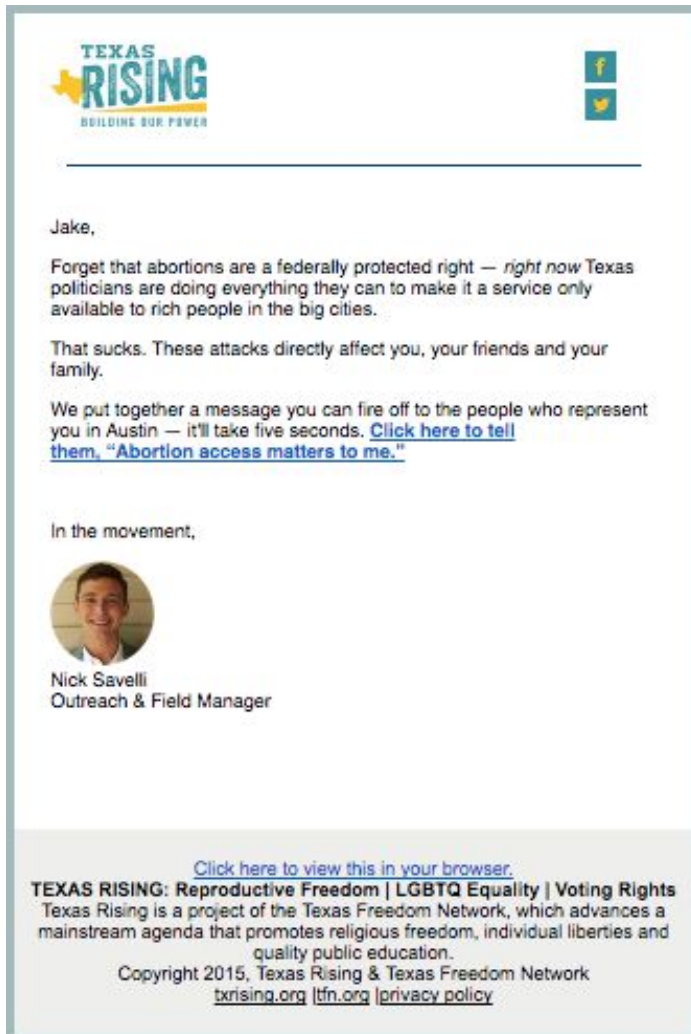
Appendix: Templates and Resources

Example automated welcome series (Texas Rising, 2015):



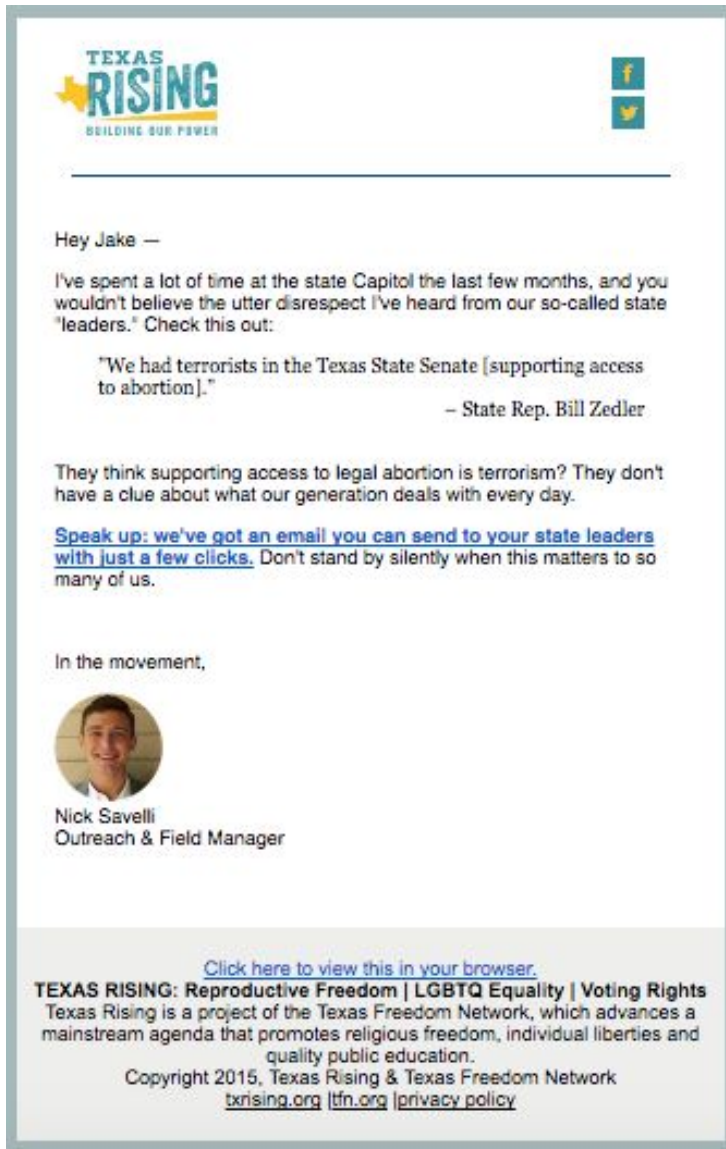
Auto Welcome Email #1:

- Sent automatically right after the recipient signs up.
- Provides basic information about the organization and some concrete accomplishments.
- The recipient just signed up, but has already received their first "ask" to engage: an invitation to like and follow the organization on social media.



Auto Welcome Email #2:

- Sent a few days after the original welcome email. Also, note that the recipient is now receiving your organization's regular emails and newsletters in addition to automated personalized outreach.
- Brief and to-the-point with a bolded and obvious action-taking link. *Be wary of tallying link-clickers as action-takers*, as many will click the link without completing the action.
- Notice that this email escalates the action the member is asked to take when compared with the previous action. Now, the recipient is being asked to sign a petition.



Auto Welcome Email #3:

- Distinct in appearance and content from previous emails, so that the welcome series remains engaging.
- Bolded and obvious action link, with an escalated ask. Now the recipient is being asked to send an email to their state policymakers.

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.

Sample Action-Taking SMS Script

SMS messages included the members' first name and often linked to more information, such as a video to share online or about an upcoming in-person event.



SMS Action-Taking Example

3:06 PM

Hi David! This is Maleeka with Climate Action Campaign. Join the growing movement for a transportation system that is good for our health, good for the planet, & connects everyone to opportunity--can you like & share this short video on Facebook? <https://bit.ly/2UNwlsW>



Tap to load preview



36 min

- SMS provides a great way to promote action-taking on low-level actions, such as expressing support for an issue or signing a petition.
- [In this experiment](#), individuals who responded to the initial action-taking ask were later sent a follow-up message with another, higher-lift, action-taking opportunity.
- SMS is an effective tool in eliciting action-taking from your members and moving them up the ladder of engagement.