

a step-by-step guide:
**activating group
members by phone**



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DEFINITION

A phone tree is a prearranged, pyramid-shaped system for activating a group of people by telephone. Using the phone tree system can spread a brief message quickly and efficiently to a large number of people.

USES

1. Quickly mobilize members and/or supporters in emergency situations (for example, when a vote on key legislation is pending and a barrage of calls, faxes, e-mails, and letters are needed).
2. Notify members of meetings, hearings, actions, and last-minute changes.
3. Increase turnout by providing personal invitations to reinforce e-mailed notices.

RESOURCES NEEDED

1. **People:** A coordinator and a network of reliable people form the skeleton of the phone tree.
2. **Time:** The coordinator will spend time organizing the tree. (This process should be done prior to serious activation of the tree.) Once it's set up, the tree can do dozens or even hundreds of hours of work with only five to 50 minutes of involvement by each member, depending on the frequency and number of calls each member is assigned.

ACTION CHECKLIST

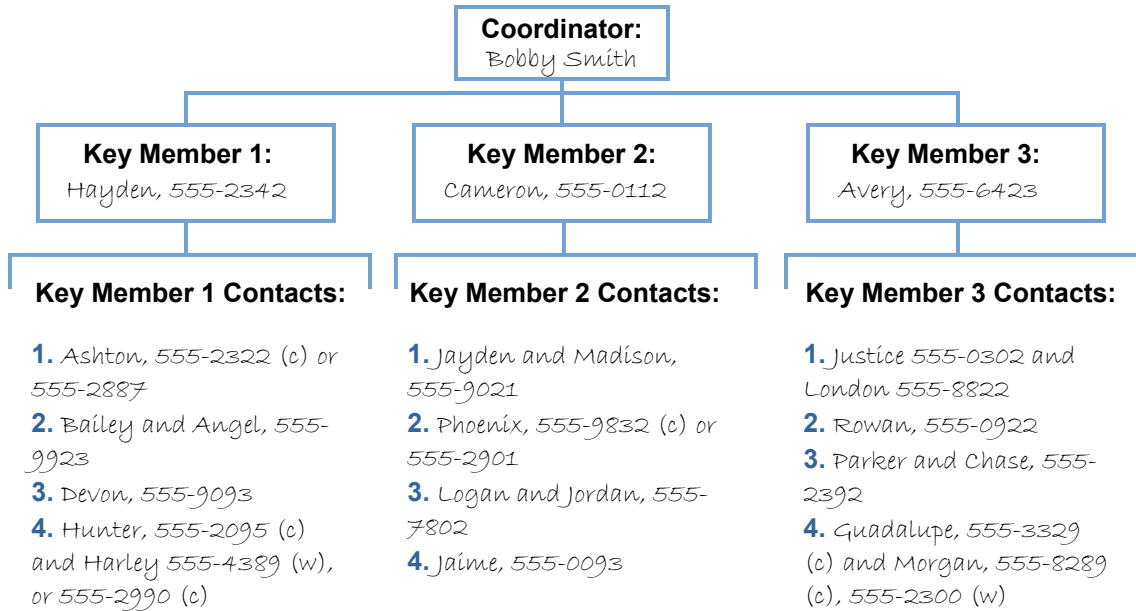
1. Make a list with current phone numbers of all the persons you want the tree to reach.
2. From that list, recruit a smaller group of people who will be responsible for calling and activating other members. This small group is referred to as the Key Group. Keep the Key Group as small as possible. **It is critically important that the members of the Key Group are reliable!**
3. Divide the people on your list among the members of the Key Group (try to limit calls to three to eight per participants).
4. Make a chart of Key Group members and their assignments and distribute it to the Key Group. Be sure to include work, cell, office, and other numbers to locate members.
5. Ask key people to notify you when they are going out of town or will otherwise be unavailable. Have alternate Key Group folks that can fill in if someone is unavailable.

OPERATING THE TREE

1. As coordinator, you will begin the tree. Write out a brief script, noting the specific action each member needs to do (call their legislators, write a letter to the editor, come to the next planning meeting, etc).
2. Call the members of the Key Group using the script. Make sure that Key Group members understand what they need to do and the time frame in which they should do it.
3. Make sure the folks in your phone tree to keep trying each person on their list until they make contact. If a member cannot be reached, have the caller notify you as the coordinator so you can fill in (or delegate the responsibility to someone else).

SAMPLE PHONE TREE

This is an example of what your phone tree *may* look like. This group is coordinated by Bobbie Smith, and has three key members, Hayden, Cameron and Avery. Each key member calls four contacts. Some numbers are specified as cell (c), or work (w).



BLANK PHONE TREE

It's time to make your phone tree. This blank phone tree should help you through the process. Tailor it to fit the needs of your group. If this tree doesn't work for you, create one of your own. Keep in mind that some group members may have more than one contact number—mark the numbers as cell, work, etc. When you are done, make copies for your key group members.

