

## ***Building Your Local COS Volunteer Team***

This process has been put together to support you in achieving a key goal for your role as a District Captain (DC) here in NC: *Building your local team.*

As a DC you are asked to spend time regularly following up with new Volunteer Activists (VAs) and petition signers no less frequently than weekly preferably every 2-3 days.

When making your initial contact with any potential volunteer, we've found the best way to do so is via phone. Because many people don't answer calls from numbers not in their contact list, you might consider first sending a text to introduce yourself and then follow-up via phone a day or two later.

Using Citizen Builder (CB), there are two ways to identify potential volunteers you can contact to get engaged. These methods and steps to do so are described in sections #1 and #2 below. There are also general recommendations for tracking communications with both groups of volunteers described in items #3, #4 and #5 below.

Petition signers who have taken action to get involved can be identified in the Leaders (LMT) module found under tools in CB. These individuals have stepped up to get involved by applying to serve in various roles with us and have been vetted and onboarded before being assigned to their role.

The ideal prospects for getting engaged with your team have been assigned to the role of Volunteer Activist (VA). We encourage you to reach to other volunteers in your district, such as social media warriors, state content writers, etc. However, unlike VAs, they have other things they do regularly in their role. We encourage you to include them in district level activities, such as working at gun shows, festivals or other petition signing events and team meetings, etc.

### ***1. Following Up with Your Volunteer Activists:***

**A. To View All of Your Current VAs:** If you are a new DC or an existing DC who has not done this before, to identify all of the VAs in your district:

- a. Go to the Tools option in the CB and choose Leaders (LMT). When the LMT screen comes up, all assigned volunteers in your District will come up sorted alphabetically by last name.
- b. To view only VAs, go to the Role column and click on the "Any" box in the medium grey bar just below the word Role. Choose 'Volunteer Activist'.
- c. To view the VAs full profile, click on their name. When working with volunteers, please be sure to enter notes about your interaction with them in their profile.

***B. Reaching Out to Newly Assigned VAs on an Ongoing Basis:***

Once you've interacted with your initial base of VAs, it is important that you continue to monitor your list of assigned VAs to reach out to new VAs. At least weekly, preferably every 2-3 days, use these steps to go back to LMT to identify newly assigned VAs.

- a. Go to the Tools option in the CB and choose Leaders (LMT).
- b. When the LMT screen comes up, all assigned volunteers in your District will come up sorted alphabetically by last name.
- c. To view those VAs assigned since you last logged in, click two times on the word "Status" in the 2<sup>nd</sup> column. The most recently assigned VAs will appear at the top of the list.

***2. Mining the District Dashboard (DD) to Find New Volunteers:***

We also want to engage those new petition signers (NPS) who have not yet stepped up to volunteer. To do so, we use a module called the District Dashboard (DD).

One area to focus on for building your team is petition signers who expressed interest in volunteering when signing the petition but have not applied to serve in any specific role. As you become more and more familiar with Citizen Builder (CB), you will learn other ways to slice and dice information.



In NC, we have a FUT Team (Follow-up team) that reaches out to New Petition Signers (NPS). This frees you as a DC from doing the routine work of follow-up and allows more time for focusing on actively building your team. More on this activity in section #3 below.

To access the (DD), go to the tools menu in CB and choose District Dashboard (DD). When the DD comes up, it will be sorted alphabetically by last name listing all petition signers and supporters in your district(s),

To use the DD most efficiently, we recommend filtering the list of supporters as follows:

- A. Click two times on the "Created At" column to sort the records in descending order (newest date first). The "Volunteer Interest" column defaults to any. Hoover over the word "any" and change the value to "yes".
- B. The "FUT Status" column needs to be activated, this is accomplished by clicking the white circle with the + sign, "FUT Status" will be the third line down and will have a white background clicking it will change it to a gray background and will activate the column. This column has a dropdown with 6 options, Any, New Followup, In Progress, Completed, N/A, or N/C. The first four will be the most used. The FUT Status option used daily should be New Followup.
- C. The "Volunteer Interest" column provides information about NPS who expressed interest in volunteering when they signed the petition. There are three options for this field, Any (which show the list , yes or No. The Volunteer option used daily should be "Yes". When this field is changed to yes, you will need to click on the blue circle with the check mark in the middle to filter all your data based on the info above.
- D. Now you're done. The rest of the default settings are good for daily usage.

Note: If you do not log out of CB at the end of the daily activity these settings will remain activated.



### **3. A Special Note about Following up with New Petition Signers:**

As noted above, in North Carolina, we have a team of volunteers who handle the follow-up process for all new petition signers. This process includes checking the contact information in the profile for completeness and accuracy and making the initial contact with the NPS. For NPS that did not express interest in volunteering with us, this process includes sending a welcome e-mail and a text message. For NPS that do express interest, the FUT team members will call them to thank them for their support and encourage them to go to [www.conventionofstates.com/takeaction](http://www.conventionofstates.com/takeaction) to learn about how they can get involved.

Though you can call new petition signers whenever you'd like, we encourage you to wait until the follow-up process is complete. Provided below are the three stages in the follow up process:

**"New Followup":** The address has not been checked and the "Thank You" email has not been sent.

**"In Progress":** The address has been checked and the "Thank You" email has been sent. The text message and/or phone call has not been accomplished. That is why the file has not been marked as "Completed".

**"Completed":** All the initial "Followup" activity by the FUT Team has been completed and the NPS's file is ready to be reviewed and/or acted on by the DC.

If you choose to wait to contact a NPS until after their follow-up is complete, you can. To filter the list so you can only view those that are complete go to the top of the FUT Status column, click on the drop down beside the word, "any", and choose "complete". Click on the blue circle with the check mark to refilter the information.

#### ***4. Tracking Your Communications with District Volunteers:***

CB is built much like a customer relationship management system meaning it allows you to send individual, transactional e-mails, mass e-mails, mass texts and track your communication with volunteers.

To allow us to all work effectively together with petition signers, we ask that as you communicate with current and potential volunteers, please record thorough notes in the petition signer's profile.

To access a petition signer's profile from the DD, just click on their name.

To access a petition signer's profile from LMT, click on their name in the LMT profile. When their LMT profile opens, you'll see a link that reads "open profile" below the petition signer's avatar and social capital score. Click this link to open the profile.

#### ***5. Leaving Notes in CB Profiles:***

When recording notes in petition signer profiles, please use the Contact Log option (not the note option) and choose the appropriate type of note in the drop-down box. If the options listed do not apply, choose "other". That allows you and others the opportunity to filter notes at some point in the future.

***Many, many thanks for serving as a District Captain for COSNC.  
Your work with us is critical to our success!!***