

HCAO Follow-up Guide

What is HCAO Follow Up?

HCAO Follow Up is the phoning and, if necessary, sending of emails to supporters or potential supporters after they have given us contact information on a *Sign-in Sheet, Statement of Support, Photo Petition Release Form, Questionnaire* or other forms. Ideally, whenever an individual or group is going to collect such information, follow up will be part of the planning process.

Also, ideally, local groups will have a team of people who do follow-up work. Nevertheless, in the past HCAO has not followed up in any systematic way. Therefore, follow-up callers may also be asked to follow up with some of these folks. In this case, they will probably be emailed a spreadsheet with names and contact information for people who need to be called, and they may not know when or at which event the person signed in. That's not a problem, but apologies may need to be made for our delay in contacting them!

Goals for Follow Up

- **Educate** supporters and potential supporters about “Health Care for All” and how we are building a strong grassroots movement to create a comprehensive, equitable, affordable, publicly funded, high quality, universal health care system serving everyone in Oregon and the United States.
- **Mobilize** potential supporters into becoming supporters and supporters into becoming actively involved in HCAO. We know that when the time comes, we will need a minimum of 1.1 million Oregonians who support and will vote for a measure that provides for equal access to comprehensive, equitable, affordable, publicly funded, high quality health care for all who work or reside in Oregon. To educate and engage these voters in the movement, we need a robust group of volunteers involved in grassroots organizing. **Follow up is a key part of engaging those volunteers.**
- **Raise funds** for HCAO and a local group. We cannot build a movement unless we have funding for staff, materials, events, etc. Fundraising is essential and can be FUN!

What if My Group Doesn't Have a Follow-up Person or Team?

Please try to recruit a follow-up coordinator and other callers! Every local group needs leaders, a data person and a volunteer or follow-up coordinator and calling team.

Send your leadership team (leader, data person, follow-up team) to a follow-up training so that follow up is part of every event or house party you are involved in.

If, in the meantime, you or your group has no one for data and/or follow up please, contact Jana Gregory - contact information at end of document.

Preparing for Follow Up

- Review this Guide and the HCAO Follow-up Summary so you understand the process.
- Talk to your local follow-up coordinator, Jana Gregory, and/or attend a Follow-up Training if you have questions. You can also go to the **Take Action** section on www.hcao.org to find the *Follow Up Kit* that contains all the information and forms you will need to do follow up. Don't hesitate to ask for help!
- Read through the *Glossary of Volunteer Opportunities to Support Health Care for All Oregon*. It contains great information on the many ways folks can get involved in helping to win universal health care as well as information about state committees, caucuses and data protocols.
- Keep handy this guide, the follow-up summary sheet, copies of the *Combined Check-in Call & Volunteer Interview Form* and the *Combined Follow-up Call Script*. If you attend a follow-up training, you will receive a folder with hard copies of these documents as well as electronic copies by email.
- Check the website, the newsletter or with a local group to find out about upcoming local events to which you can invite the person you are calling.
- Create a folder on your computer in which to place all of the documents and resources you will need to do your work as follows:
 - Combined Check-in Call & Volunteer Interview Form
 - Combined Follow-up Call Script
 - Email Text for Request of Information
 - Email Text for Check-in Call

- Email Text for Volunteer Call
- HCAO Brochure
- HCAO Insert: A Health Care Reform Primer
- HCAO Insert: HCAO and the HCAO Education Fund
- HCAO Insert: HCAO Position on the Affordable Care Act
- Summary of Michael Dembrow's HB2922

There is a list of these documents in the *Follow-Up Kit Contents* document. Each item is hot-linked to the document so that you can download it. Or if you attend a training, the trainer will email you all of the documents, which you can download and save into your folder.

- Review the *HCAO Follow Up Summary* so you know to whom you need to send information immediately, what to do if someone has already filled out an *HCAO Supporter Involvement Opportunity Form* and only needs a thank you call, with whom you need to do a Volunteer Interview, with whom you need to do a Check-in Call and to whom you need to send either a Check-in or Volunteer Email because they left no phone number. And remember, your goal is to convert a check-in call to a volunteer interview! We need new activists!
- Print out the number of *Combined Check-in Call & Volunteer Interview Forms* you will need for the current list of folks to be called. If you are calling from a spreadsheet, it will contain names, addresses, phone numbers and email addresses for the people you will be calling and whose data you need to verify. **Also**, the Notes field contains requests for information and offers to volunteer or become involved.
- If you are calling from copies of documents, have them at hand so that you can verify all of the contact information with the person you are calling. Often it is very difficult to make out addresses, phone numbers, email addresses and the spelling of names. **Your verification of information is important in keeping our data correct!** These documents also contain requests for more information and/or indicate an interest in volunteering and becoming involved.
- Practice each type of call on a friend, family member or by yourself. After a few times through, you will make the script your own and will feel natural in the way you speak with the person you are calling.
- Follow the guide in the script for information about how many times to call and what to do if you don't reach the person.

- Lastly, we occasionally get people who say they want to volunteer but don't give a phone number. Send them the email for the volunteer interview.

When Do I Need to Follow Up?

Follow up needs to happen as soon as possible after an event. The guideline for a house party is 7 days; for a bigger event, you may need two or three weeks. **But the most important thing is to call as soon as possible** while the contact with HCAO is still fresh in the mind of the supporter or potential supporter. We estimate that it will take between one and one-half and two hours to do a list of twenty-five people.

What Do I Do after I Have Made My Calls and Sent My Emails?

If you are calling from a spreadsheet, please return the spreadsheet to the person who sent it to you. Be sure to:

- Fill in the date of the Check-in Call if you completed that process
- Fill in the date of the Volunteer Interview if you completed that process
- If your Check-in Call resulted in a Volunteer Interview, put the date both in the Check-in Call field and the Volunteer Interview field.

Return the Combined Check-in Call & Interview forms to the person who sent you the spreadsheet. The data will need to be entered in the local and state databases and then the originals of the form sent to the HCAO office.

If you are calling from originals or copies of *Sign-in Sheets, Statements of Support, Photo Petition Release Forms, Questionnaires* or other forms, please return the documents and the *Combined Check-in Call & Interview Forms* to the person who gave them to you unless you are doing follow up for a house party (in which case, please follow the House Party Guidelines) If you are doing follow up on your individual work, please send the documents to HCAO, 619 SW 11th Avenue, Portland, OR 97205, Attn: Jana Gregory.

You are making a difference! Thank you for your time and effort!

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