



How to Run a Friendbank

This resource is designed to be a step-by-step guide to walk you through hosting your own friendbank event through your League. If you need additional support or have further questions while planning your event, please reach out to us at organizing@lww.org.

- [What's the Ask?](#)
- [Planning Your Event](#)
- [Setting Up Your Action on OutreachCircle](#)
- [Recruitment](#)
- [Training Your Volunteers](#)
- [Debrief](#)
- [Tracking Your Data/Measuring Your Impact](#)
- [Follow Up](#)

What's the Ask?

The first thing you will need to determine when planning your friendbank is what your volunteers will be asking their friends and family to do. Sign a petition? Visit a website to learn more information? RSVP to an event? Contact their representative about a legislative priority?

Tip: You will want the ask to be simple enough that it can be communicated in a text message with limited characters. It may be helpful to include a link to another website where people can find out more information or context about whatever action they are being asked to take. (If the link is too long to include in a text message you can create a bit.ly or tinyurl to shorten it.) Ideally, there will also be some way to track how many people actually took the action (we'll talk about this more in the "Measuring Your Impact" section).

Questions to consider when framing your ask:

- Why will the people who receive these messages want to take the action? (Why does it matter?)
- Why will your volunteers want to send these messages to their friends and family? (Why is friendbanking a strategic method to get this information out?)
- Why are we asking them to take this action now? (What is the urgency?)

Planning Your Event

We have a lot of great resources on virtual event planning on our [Organizing Resource Page](#). If you're just getting started, check out this training on [Facilitating Digital Events](#) and this webinar on [Event Planning through a Diversity, Equity, and Inclusion \(DEI\) Lens](#).



While you are planning your event, you may want to set specific goals for your friendbank. These could include: number of volunteers who participate, number of texts or emails that get sent, or number of people who click the link or take the action you are including in your message. We will discuss this more in the “Tracking Your Data/Measuring Your Impact” section later on. The benefit of OutreachCircle is that it allows you to quickly and easily track lots of relevant data!

Some specific elements we recommend including in a friendbank are:

- **Training**
 - The training should cover **why** we are contacting our friends and family about this particular ask and **how** to use OutreachCircle to do it (we’ll cover this more in the “Training Your Volunteers” section)
- **Time** for volunteers to join OutreachCircle and send their messages together
 - Tip: If your event is large, consider using breakout rooms on Zoom so that smaller groups can send their messages together. This will make it easier for volunteers to socialize while sending messages and learn from each other. If you do use breakout rooms, make sure there is a trained designated person in each room who can offer basic tech support for new OutreachCircle users.
- **Debrief**
 - You want to give space for volunteers to come back together and share about their experiences. This will be helpful for the volunteers and for you as you plan future events!
- **Next steps**
 - This is also a great time to share about future volunteer opportunities or other ways to get involved with your League.

Setting Up Your Action on OutreachCircle

Just getting started with OutreachCircle? [Check out our administrator starter kit here](#)

The admin starter kit linked above shows a step-by-step guide to creating a sample action (starting on page 26). The action highlighted in the starter kit is an “Email, Text, or Share with Friends” action that they are setting up for supporters of your Circle to invite their friends and family to also support your Circle.

Although your ask may be different, the process will be the same when you set up your action for your friendbank! You will be using the “Email, Text, or Share with Friends” action type, and then personalizing the language in the Email Message, Text Message, and Share to an App Message to fit your ask. While drafting this language for each message type, keep in mind the questions that we covered at the beginning of this guide in the “What’s the Ask” section.

Still have questions? [Check out all our OutreachCircle resources on the League Management Site here](#)

For additional individual OutreachCircle technical support, come to the [Organizing Team’s Office Hours every Friday from 1 – 2 pm ET](#) or email us at organizing@lww.org.

Recruitment



We recommend asking volunteers to sign up for your event, so you have the opportunity to collect some information about them. This will allow you to send out reminders or other helpful information about the event beforehand!

You can create a simple registration form via Google Forms or if your event will be held on Zoom, you can turn on the “Registration Required” page when creating your event. We recommend at a minimum collecting the name and email address for every volunteer, but you can use these forms to collect other types of data that may be relevant to your League as well.

Other data you may want to collect through your sign up form is:

- Phone number
- Have you ever used OutreachCircle before?
- Have you volunteered with the League before?
- How did you hear about this event?

Since many of your volunteers may have never participated in a friendbank before, it could be helpful to share a [Frequently Asked Questions document like this one](#). You could either make this available when they initially sign up for the friendbank or send it out in the reminder email (or both!)

For general best practices on recruiting and managing volunteers, check out these trainings: [The basics of successful volunteer management](#) and [Creating a culture to retain and grow your volunteers](#).

Training Your Volunteers

It’s important to include a training element to every volunteer event. This will help get everyone on the same page about not only how to volunteer, but also why you are asking them to volunteer. Many of your volunteers may be friendbanking for the first time or using OutreachCircle for the first time, so this is a good opportunity to help them feel comfortable and confident with the tools. You can use and adapt the [Friendbank Training Template we created here!](#) (Note: The powerpoint will automatically download when you click that link.) Look out for the highlighted sections of that training where you can personalize and add specific information about your League.

Tips for trainings:

- Include a visual element! If you are on zoom you can share your screen and show slides or even screenshots of what the actions will look like as you explain how to take the action.
- Start from the very basics! You don’t want to assume too much knowledge from your volunteers.
- Introduce yourself and the League. It may be that all your volunteers are League members and know exactly what the League stands for, but it is always a good idea to introduce yourself as the trainer and the League.
- Include “the why”. Because you are potentially training volunteers on a new skill or tool, it can be tempting to jump straight into “the how” or the technical side of the training. It’s always important to include a brief explanation of why you are friendbanking to help volunteers to stay motivated and inspired while they are contacting their friends!
- Leave time for questions at the end.

- Provide additional resources when possible. These could include:
 - A Frequently Asked Questions document. [You can find an example here.](#)
 - This [OutreachCircle Supporter Kit](#) for people who are using it for the first time
 - Links to relevant background information about what you are asking your volunteers to contact their friends about.

Debrief

After you've fully trained your volunteers and spent some time together contacting your friends and family, you will want to take a few minutes at the end of your event for a debrief. This is a great opportunity for people to share about their experiences and share stories of any responses they may have received from friends or family during the friendbank. You can also get good feedback on how to make future events better!

At the end of your debrief, make sure you include any future events, activities, or volunteer opportunities you have coming up to give your volunteers some next steps to stay engaged in the work you are doing.

Tracking Your Data/Measuring Your Impact

Tracking your data and measuring your impact will be key to understanding how successful your event was. This data will also be helpful for you as you create goals and strategies for future events. The great thing about OutreachCircle is you can automatically see how many people take your actions, how many texts or emails they send, and how many emails get opened! This is an immediate way to measure your impact by seeing how many people your volunteers were able to reach. Depending on what your ask is and what other tools you are using, there may be a way to track how many of the people your volunteers texted and emailed actually took the action. (Example: You may be able to use UTM links to track how many people used your specific link.)

Data you may want to track is:

- Number of volunteers who attended your event
- Number of new supporters you gained on OutreachCircle
- Number of people who took your action on OutreachCircle
- Number of texts/emails sent
- Number of people who completed the ask (clicked on the link in the text/email)
- Number of volunteers who signed up for another event/volunteer opportunity after the friendbank

Follow Up

Follow up is an important part of any event! Once your volunteers attend your event, you don't want that to be the last time they hear from you. You can do follow up in a number of ways: sending an email to everyone who attended the event, posting a follow up action on OutreachCircle for your supporters to take, or individually following up with people who participated.

Key components of follow up:



- Thank your volunteers for attending your event
- Remind them of the impact they made through their actions (great time to share some of the numbers you collected – “together we sent x texts and y emails!”)
- Give them a clear way to stay engaged (sign up for our email list, continue checking out our OutreachCircle, attend this next volunteer opportunity/event)