

Dialing for Citizens

by Otis White

You've worked hard to organize a community visioning initiative. You've raised the money. You've thought through how citizens will participate, how their ideas will be incorporated in the plan, and how the plan will be compiled and presented. You've even considered how to bring along community leaders, like city council members and business leaders, so they embrace the final product.

There's just one problem: how do you get citizens to participate? How do you persuade a cross-section of your community to attend vision meetings and share their ideas about the future?

This is critical because, in my experience, visioning efforts don't succeed on the quality of the plans they produce. They succeed because citizens recognize these plans as reflections of their ideas and ambitions – and support them. And for that to happen, you need the citizens to ... well, show up and participate.

I've worked on a number of community visioning initiatives and, along the way, tried many ways of coaxing citizens out of their homes and into meetings. We've built web sites, cranked out press releases, placed flyers in public libraries, worked with civic groups and neighborhood associations, advertised with online groups, mounted speakers' bureaus, and conducted e-mail blitzes. Most of these things work to some degree. My advice is to do them all.

But the single most effective way we've found of convincing citizens to turn off the television and spend an evening talking about their community's future is with phone trees. That's right. The old, reliable form of communications: one person calling another.

Make no mistake. Phone trees are demanding. We spend twice as much time organizing them as we do on all other communications efforts combined,

including building web sites. If other ways of involving citizens worked as well, we'd hang up on the phone trees in an instant. But they don't.

IF OTHER WAYS OF INVOLVING CITIZENS WORKED AS WELL, WE'D HANG UP ON THE PHONE TREES IN AN INSTANT.

Two Motivations for Public Meetings

Phone trees are effective because most people attend community meetings for one of two reasons: there's an issue being discussed that they think will affect them directly, or because *someone they know and respect* asks them to come. You know the first reason, it's what brings people to planning commission meetings when a controversial rezoning item is on the agenda.

Visioning, though, doesn't work on such a direct and personal level. It's distant and communal. It asks participants to imagine the community as it could be at a point in the future (often, 20 years or more) and describe what they see. These are exciting, creative public meetings, but they don't typically involve the kinds of issues that attract many citizens. If you want large numbers to turn out for visioning, then, you need another motivation. My suggestion is to get someone they know and trust to ask them to come.

Thinking about Phone Trees

Before organizing one, it's helpful to think about how phone trees are structured. Basically, they have three parts: a leader or leaders who recruit volunteers to do the calling; the volunteers themselves; and enough support and information for the volunteers to be effective.

The most important part is often the leader (we call them "site chairs"). You have to find people who can convince others to volunteer their time for a most unusual community project, a visioning initiative. The good news is that such people exist in every community and, in fact, in every neighborhood. You simply have to look for them.

 *What Makes a Good Site Chair?*

Another critical consideration: how many vision meetings will you hold, and where will you hold them? If your community is large enough, you'll probably want meetings in different neighborhoods. If so, you'll need a site chair and volunteer team for each site. Why? Because leaders who can turn out crowds in an affluent neighborhood probably won't have much success in a low-income one. So, if you have five neighborhood meetings, you'll need five different phone trees.

Making the Volunteers Effective

At this point, your head may be swimming. Relax. This sounds more difficult than it is. If you pick the right site chairs (we usually recruit two per site, to divide the work load), they'll find the right volunteers. That leaves you to worry about making the volunteers effective.

We do this with four things: enough written information so that volunteers know exactly what they're to do and when to do it; a well thought-out timeline so the calls come at the right time; a training session; and a series of e-mail reminders.

We assemble the written materials in a packet, with background sheets on visioning, a volunteer's job description, an outline of how vision meetings are conducted, information on when and where the meeting will be held, and a set of talking points for making the calls. We also include forms for keeping track of progress.

The timeline is a set of tasks and deadlines. You count backward from the meeting date, setting deadlines for the calls, the training session, the recruiting of volunteers, and signing up of the site chairs. A rule of thumb is that it takes about 50 days from starting the search for site chairs until the meeting itself.

The last two items, a training session and e-mail reminders, are motivational tools. We understand that it's one thing for volunteers to agree to make calls and another for them actually to do it. So we do what we can to build enthusiasm and keep volunteers focused on their tasks.

The training session is held about a month before the vision meeting and allows us to talk with the volunteers about their jobs and answer questions. It also allows them to see who else is working on this project and get excited about visioning.

We usually begin with a 10-minute preview of visioning where we ask the volunteers for their ideas and images of the community as it might be in 20 years. At the same time, we gather volunteers' e-mail addresses and start sending out reminders of tasks and deadlines.

Worth the Trouble?

Obviously, we put a lot of time and energy in creating and managing phone trees. Are they really worth the effort? We think so for two reasons.

First, they work. Better than anything else we've tried, they turn out the numbers we need to make visioning work.

Second, they attract a broader cross-section of citizens. Many who attend the vision meetings have never been to a public meeting before – and wouldn't have come to this one, except that a neighbor called. By getting a cross-section, we gain a more accurate understanding of the citizens' ambitions and desires for the community, which leads to a stronger, more representative plan. And there's a side benefit: some citizens, invited to think about their city's future, stay involved, which brings new people to civic leadership.

All in all, not bad for a hundred-year-old form of communications. ♦



What Makes a Good Site Chair

Probably the most important step in building a phone tree is getting the right site chairs. It helps, of course, if you know what you're looking for. Here are four traits we think are most important:

- They are known and respected in their part of the community. If they ask others to do something, it's considered seriously.
- They know the area's grassroots leaders in neighborhood associations, community groups, businesses, faith organizations, and not-for-profits. These are the best potential volunteers for a phone tree.
- They are dependable and responsible. When they say they'll do something, you can be sure it'll be done.
- They support involving citizens in visioning. The idea of visioning – setting a community's direction by listening to the citizens – is deeply appealing to them.

E-mail vs. Phone Calls

Wouldn't e-mails be more efficient than phone calls? Only if you judged them by ease of delivery. If you judged by results, the answer is no. Even personally-addressed e-mails are not much more effective than articles in newspapers or fliers in public buildings at turning out large numbers of people.

Why? Because no matter how chatty we try to be in them, e-mails are more impersonal than phone calls, and their messages don't stick as long in our memories. Phone calls interrupt us, grab our attention, and are highly interactive and personal. The result is that we remember them longer. One more thing: phone calls are good at getting commitments. That's why telemarketing thrived until the federal Do Not Call Act was passed. And it's why community phone trees, which are exempt from the law, are good at putting citizens into meetings.

The Mathematics of Phone Trees

How many volunteers do you need for a phone tree? Depends on how many people you want to attend. Let's assume you want 100 citizens at each of your vision meetings.

To get that many, your volunteers will have to make 300 phone calls. The reason for so many calls is that about a third of those who are invited will actually end up attending the meeting. How many volunteers do you need for 300 calls? We've found it takes 20 people willing to make 15 calls each to friends and neighbors ($20 \times 15 = 300$).

The phone calls needn't be lengthy. But we do ask volunteers to actually speak to the people they are calling, and not settle for voice mail. Based on our experience, most volunteers should be able to complete their calls in three evenings' work.

Even so, isn't it a lot to ask of volunteers that they make 15 phone calls? Not really. The best of these volunteers are people deeply networked in their neighborhoods – neighborhood association presidents, volunteer firefighters, business owners, civic club leaders, and the like. They know whom to call and how to explain things.

One of our best volunteers, for example, was a hair-salon owner. As he shampooed, cut, and colored hair, he made his 15 calls in three days' time – without ever picking up a telephone!

One final note: we ask our volunteers to get the street addresses of those who say they "definitely will" or "might" attend. The volunteers enter the names and addresses in an online form, and we use these addresses to send out a reminder postcard about three days before the event. We also ask the volunteers to make a final round of calls – also a few days before – to those who said "yes" or "maybe." For the reminder calls, we tell them it's OK to leave a voice mail.

*Otis White is president of Civic Strategies, Inc., a consulting firm based in Atlanta that helps communities make important decisions: <http://civic-strategies.com/> White has designed and managed numerous visioning projects and is writing a book about how cities make dramatic changes. His previous articles for the *Planning Commissioners Journal* include, "Taking the Mystery Out of Economic Development," (PCJ #43); "Should You Run?" (PCJ #33); "Gaining Legitimacy" (PCJ #21); and "Getting Power By Giving It Away" (PCJ #18).*





P.O. Box 4295, Burlington, VT 05406 -- Telephone: 888-475-3328 -- FAX: 802-862-1882

License Fee to Print or Make Up to 20 Copies of Article

Please note that if you initially paid for the right to print one copy of this article (and/or store on one computer) and you now want to print or make additional copies of this article (up to 20 copies) you need to return this form to us with an additional payment. The license fee depends on the length of the article. Use the following table for calculating the license fee for each article:*

1 page article: add'l \$5.00	4 page article: add'l \$9.50	7 page article: add'l \$14.00
2 page article: add'l \$6.50	5 page article: add'l \$11.00	8 page or longer article: add'l \$15.50
3 page article: add'l \$8.00	6 page article: add'l \$12.50	

* Partial page is considered a page when determining article length (e.g., fee for 2½ page article would be \$8.00). Call us for fee if you want to make more than 20 copies of an article.

You can either enclose a check (payable to: Champlain Planning Press, Inc.) or use your credit card (Visa, Master Card, or American Express).

List article(s) you are enclosing payment for (you can use one form if you want additional copies of more than one article; list each article, using reverse if necessary):

Your name & address: _____

Your e-mail address: _____

Please return this form with your payment. Mail to:

Planning Commissioners Journal, P.O. Box 4295, Burlington, VT 05406

If you are paying by charge card, please complete below:

Card # _____ Exp.: _____ (mo/yr)
Name on card: _____
Cardholder address: _____

Phone #: () _____ Authorized signature: _____

Please call us if you have any questions: 888-475-3328 (toll free)