



CONVENTION *of* STATES ACTION

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Intro

TelePatriot is a feature of COSAction, designed to enable volunteers to reach a large number of supporters via phone in an efficient manner, and optionally capture feedback from those contacted. This is done by assigning volunteers to one or more TelePatriot teams, and missions are created with a phone script and a defined list of supporters from CitizenBuilder, which then are assigned to a team for execution. Missions can be as simple as a District Captain asking his/her local supporters to contact legislators or to show up at a district meet-and-greet, to a state-wide or National call-to-action with multi-state volunteer involvement.

A simple, and the most frequent, mission is a one-to-one call (2-way), where the volunteer initiates a call to a supporter and verbalizes the mission script, either to the person or in a voicemail. Missions can also be defined as a 3-way call (*feature coming soon*), where the volunteer calls the supporter, and then after explaining the purpose of the call and obtaining the supporter's consent, a mission-defined 3rd-party can be conferenced into the call (typically the supporter's legislator), to enable the supporter to speak directly to the 3rd-party.

A team may be assigned multiple missions, with calls for higher priority missions served up first, and missions of the same priority have their calls served up in a round-robin fashion. Notes are entered at the conclusion of each call which are recorded on the supporter's profile, and tags may optionally be defined for a mission which are then available for selection when completing a call.

Policy Protocol

Access Permissions

Access to TelePatriot features is controlled using the CitizenBuilder role-based permissions. There are four System roles specifically pertaining to TelePatriot:

TelePatriot Volunteer – No Dashboard access, but enables the person to be a member of a TelePatriot team and to participate in missions

TelePatriot Director – Can create and manage their own missions and teams

TelePatriot Admin – Can create and manage their own missions and teams, and can manage others' teams and missions

TelePatriot Moderator – Has all the permissions of a *TelePatriot Admin*, plus has permission to activate missions

Regardless of any other roles, the **TelePatriot Volunteer** role must be assigned in order for the person to be assigned to a team and participate in missions. When assigning this role, district assignments are irrelevant, so the *assignment should only be for the person's home lower district*. A TelePatriot Volunteer can process any call that is in the call list of a mission assigned to a team they are a member of, regardless of their assignments.

Volunteers making calls using TelePatriot must meet certain minimal requirements, to ensure the interests of COS are being upheld, and our proprietary information is properly protected. This is accomplished by requiring all TelePatriot callers to be assigned with the TelePatriot Volunteer role (a system requirement to be added to a TelePatriot team), and this automatically enforces the following requirements:

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- Have a CitizenBuilder confirmed account
- Signed the COS Petition
- Signed the Volunteer Confidentiality Agreement
- Not a banned or deceased person

Anyone who has an assigned role should already meet the above requirements, but a convenient means of getting a new supporter ready to be assigned is to have them apply for the Volunteer role (or any role) on the *Take Action* page of the website. Submitting their application assures they will have met all of the above requirements.

The TelePatriot Volunteer role (and the other 3 TelePatriot roles described above) can only *initially* be assigned from the *Leader Positions* tab of the CitizenBuilder profile (not from LMT). Once assigned, the TelePatriot roles may be unassigned within LMT. Following is a table showing the roles able to assign and manage TelePatriot roles:

Role	Can Manage This Role			
	TelePatriot Volunteer	TelePatriot Director	TelePatriot Admin	TelePatriot Moderator
National	Yes	Yes	Yes	Yes
Regional Director	Yes	Yes	Yes	Yes
State Director	Yes	Yes		
State Information Analyst	Yes			
TelePatriot Moderator	Yes	Yes		
TelePatriot Admin	Yes	Yes		
TelePatriot Director	Yes			

National and Regional Director roles have equivalent permissions to the TelePatriot Moderator role, and State Information Analyst role has equivalent permissions to the TelePatriot Director role.

Each State Director should establish policies within the state, in consultation with the Regional Director, for how the TelePatriot roles are to be managed within the state. This especially applies to the TelePatriot Moderator role, which is the role that allows the leader to activate missions. Some states may choose to have the Regional Director review all missions, whereas others may have one or more leaders to whom they delegate this authority. The State Director (or Regional Director in the absence of a State Director) has the responsibility for awareness and oversight of the TelePatriot activity within the state.

Review and Approval of Missions

Missions can only be activated (published) by leaders with National, Regional Director, or TelePatriot Moderator roles, and as noted above, only National or Regional Director can assign someone to the TelePatriot Moderator role. These are the leaders who are responsible for reviewing and approving new missions. The following are considerations before activating a mission:

1. Mission scripts should be reviewed for compliance with 501(c)(4) restrictions, appropriateness, and professionalism.

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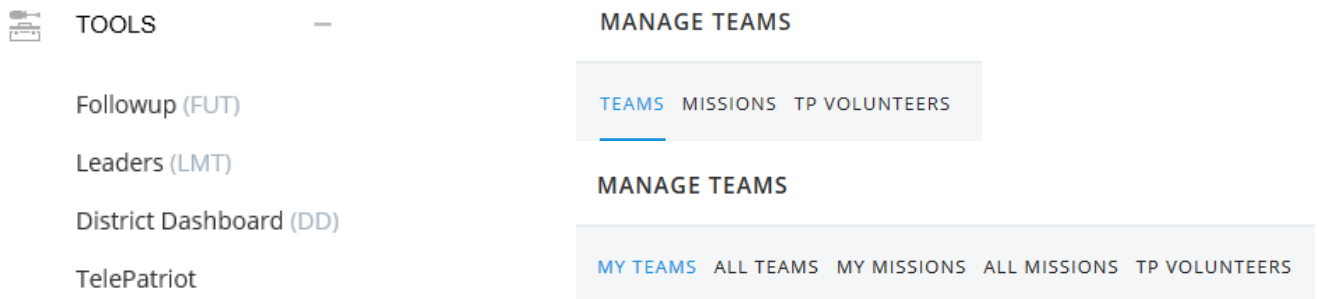
2. All missions related to legislative actions, other than just requests of constituents to contact their legislators asking them to support COS (e.g., legislator 3-way, CTA – Call-to-Action) must be approved by the Regional Director and National Legislative Department.
3. Mission scripts cannot contain political campaigning, political endorsements or support, party support or endorsements, nor any negative/derogatory messages related to a campaign, party, legislators, or candidates.
4. Missions with out-of-state team members must be approved by the State Director(s) of each state involved, and must originate from the home state (i.e., the mission author must either be the Regional Director, or someone within the home state).

Once a mission is activated, any changes to the mission by someone without the “activate” permission automatically causes the mission to be inactivated, requiring a secondary review before reactivating.

CitizenBuilder TelePatriot Tool

Administratively, TelePatriot is managed from the TelePatriot Tool, located under the Tools menu of the CitizenBuilder Dashboard.

Access to the TelePatriot Tool is granted based on assigned roles. TelePatriot Directors can see their own Teams and Missions, and TelePatriot Admins and TelePatriot Moderators can see **all** Teams and Missions.



Team Names

Each mission is assigned to a Team, which designates who is able to *see* the mission in TelePatriot and make calls. To maintain some order to the teams, names should follow these guidelines:

- Teams which include all TelePatriot Volunteers in an entire state should be named with the name of the state (e.g., New York).
- Intrastate secondary teams all must begin with the state abbreviation. For district-specific teams, include the district (e.g., NY HD20), or for coalition-specific teams, include the coalition (e.g., NY Faith Coalition).
- *Personal* teams, such as for test or practice missions should begin with the state abbreviation followed by the person’s name (e.g., NY John Smith).
- Multi-state teams should begin with US, followed by an appropriate designation for the volunteer segment (e.g., group of states, coalition, etc.).

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Teams can include other teams as “members” at multiple levels in a future enhancement, coming soon. The current sub-teams feature will be eliminated then, so avoid using them.

Mission Names

Missions will generally have a relatively short lifespan, and there may be many missions over time with a similar purpose, and thus have similar names. Hence, when naming missions, consider potential future missions to avoid name clashes, since mission names must be unique. If a particular time frame is relevant, that should be included in the name.

Mission names should be kept relatively short, but specific enough to describe their purpose and avoid potential future name clashes, and follow these guidelines:

- Intrastate missions all must begin with the state abbreviation
- Multi-state missions should begin with US
- Test or practice missions should include TEST or PRACTICE as part of the name, preferably at the end
- Time-specific missions should include a reference to the timeframe (e.g., NY HD20 Recruit DC Dec 2019)

Mission Priority

Mission priority determines the order in which calls from multiple missions, assigned to the same team, are assigned to callers. The value can be any whole number, with 1 being the highest priority (i.e., the lower the number, the higher its priority). Generally never set the priority lower than 50 (i.e., use values greater or equal to 50), so that there is ample room to leapfrog missions if needed.

As a general rule, set new missions with a priority of 100 or lower (i.e., use values of 100 or greater).

Mission Lists

Supporters to be called by the mission are defined by the List attached to the mission. Lists may be either Static or Dynamic. Static lists represent a group of supporters that can only be changed by manually adding or removing people using the CitizenBuilder List features. Dynamic lists on the other hand define a group of supporters based upon filter criteria, and thus can change *dynamically* as new profiles are created or profile attributes change which affect which ones meet the filter criteria at a given moment.

Especially for Dynamic Lists, the people included in the list can change during the life of a mission. If a person is removed from the list who has already been called, they will remain in the mission’s call history, but if they have not yet been called, they will be treated as though they were never on the list from the start.

The Mission list shows two list counts:

List Items – the total number of people on the list

Mission Items – number of people on the list who are eligible to be called (i.e., they have a name and phone number, and are not Banned or Deceased, and not flagged with *Do not contact*)

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Lists should generally be given a name that begins with the state abbreviation, but when created specifically for TelePatriot missions, begin the name with TP-, followed by the state abbreviation.

Currently a list can only be assigned to one mission at a time, but this will change in a future enhancement. Until then, if the same list can be useful for multiple missions, consider making a *master* list, and then use it to create copies for each mission. Since there currently is no direct means to *copy* a list, it can be done as follows:

Static List – Using the People Users filter, select *Lists / Static Lists* with the *is on any* operator, and reference the *master* list, then give it an appropriate unique name.

Dynamic List – The list must be created multiple times by specifying the same filter criteria, but saving with a unique name for each mission.

Tags

Two types of tags can be optionally defined for a mission:

Mission Tags – tags automatically applied when the call is completed (when call removed from queue)

Optional Tags – available to be selected within TelePatriot upon call completion

Tag names should follow these guidelines:

- State-specific tags should always begin with the state abbreviation
- Multi-state tags should generally begin with US
- Include TP in the name if the tag is exclusively related to the TP mission
- *Mission Tags* should typically be the name of the mission

If tags have only a transitory value, they should be deleted once their purpose has been satisfied.

Mission Description and Scripts

The Mission Description is shown on the COSAction TelePatriot Mission screen, ahead of the Mission Script, and is currently always displayed in its entirety, though a future enhancement will allow it to be collapsed. The Mission Script is currently collapsible. Since it is desirable to view both the description and the script without the need to scroll the screen, the description and script should generally be kept as short as possible. However, it is more important to be as complete as possible for both; just be aware of the tradeoff.

The Mission Description should briefly describe the objective of the mission, and include information that might be useful reminders to the callers. There is no formatting permitted with the description.

The Mission Script is intended to assist the callers with exactly what to say to the person answering the phone. Rich editing is available, so bold/italic/underline can be used to good advantage to draw quick attention to key words or sections of the script. Hyperlinks may also be included, should there be some reference material that could be useful for quick access by the callers. Merge tags are also available for use in the script.

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The script should generally begin with the “live” dialog for instances when the person answers the call. It may be helpful to also include a separate section below that for alternative wording for voicemail. If there are any *Optional Tags* defined for the mission, it might be helpful to highlight their intended use at the end of the script.

Mission Status

For reference, missions will have a status of one of the following:

- *Draft* – not yet activated, or an inactivated mission with no processed calls
- *Active* – available for processing
- *Inactive* – previously active (paused), with one or more processed calls (not visible to TelePatriot)
- *Complete* – manually completed, whether all calls are completed or not

When Inactivating a mission, all “reserved” calls (including Parked calls) can be revoked, or not, by an appropriate response to the prompt. If not, all calls will automatically be revoked within 48 hours due to the expiration timeout.

Completing a mission will automatically revoke all remaining calls, and **this action is not reversable**. The mission stats are then final, though they *could* change as a result of any reserved calls that get processed in the following 48 hours.

If an Active mission is edited by a user without the “activate” permission, it is automatically inactivated when saved (a warning prompt is displayed). A TelePatriot Moderator (or equivalent) will need to review the mission again and reactivate it if desired.

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Flow for Creating a New Mission

The typical flow for creating a new mission is as follows:

1. Create/review the team
2. Create and/or identify the list of people to call
3. Create any desired tags
4. Create the mission, and assign the list and any desired tags
5. Add the mission to the team
6. Activate the mission, after obtaining all appropriate approvals as described in the *Policy Protocol*

Transitional Option

The *Allow For Old TP App* option is available on the Mission page for transition purposes as we wind down use of the original TelePatriot app (TP App). When this option is not set on, the mission will not be visible to the TP App. Generally, new missions should leave this option **off**; it is primarily intended for winding down already existing missions underway with the TP App.

Caution: When a COSAction mission is also processed with the TP App, the mission stats will not be accurate, and *Optional Tags* are not available. This is because the TP App does not support the new APIs for enhancements built into COSAction. Additionally, notes sometimes do not get recorded on the CitizenBuilder profile when using the TP App due to API issues. Consequently, it is best to transition to COSAction-only missions as soon as convenient.