



Training Manual

Who is GBI Strategies, LLC?

GBI Strategies is a full-service field operations firm based out of Washington, DC, founded in 2013 by Gary Bell. Gary has over 10 years of experience working in 20+ states on 70+ operations, leading the hardworking people of the communities he serves with seamless strategy, cutting edge technology, integrity and innovation. GBI is an African-American owned firm respected in this industry by clients, candidates and communities all over the country.

What does GBI Strategies, LLC do?

We provide operational support for petition drives, corporate outreach, issue advocacy, voter registration and get out the vote (GOTV). We engage, educate and mobilize members of each community.

What is a Voter Registration Drive?

- A grassroots project to engage and educate citizens of their right to vote and register them to vote in their county.
- There are many individuals that don't know that they have the right to vote. Most convicted felons think they can't vote but many of them can. Our goal is to identify who can in fact vote while providing education.

PERSONNEL QUALITIES:

- **Punctuality:** To be early is to be on time, to be on time is to be late and to be late is unacceptable.
- **Work Ethic:** Do everything in excellence even when no one is watching. Chances are that someone is ALWAYS watching!
- **Effort:** Work to give your best. Laziness is the cousin of poverty.
- **Body Language:** Watch yours!
- **Energy:** You set the tone of the Canvass. Be upbeat.
- **Attitude:** It determines your team's altitude.
- **Passion:** Find a love for what you do.
- **Coachable:** Be quick to listen, slow to speak.
- **Going the Extra Mile:** Do more than necessary.
- **Being Prepared at All Times:** Think "What if?" & be ready.

POSITIONS:

Regional Field Director

Also called **#1s**. Duties include but are not limited to:

- Managing and training Field organizers and canvassers
- Coaching Field Organizers to create and maintain a productive and robust team
- Implementing systems of accountability to ensure that regional goals are consistently met
- Managing payroll for the region
- Coordinating regional events
- Serving as the face of the campaign in your region and representing the campaign at local events
- Securing office space and set it up for the project
- Be accountable for all the technology and equipment
- Create a location and canvassing plan for each day

Regional Field Organizers

Reports to the Regional Field Director. They are also called **#2s**. RFOs duties include but are not limited to:

- Recruit, hire, manage, and motivate canvassers throughout the project
- Train canvassers on how to use technology
- Pick up vans and make sure they remain gassed up
- Plan and execute events and trainings within turf
- Ensure data integrity and quality of voter contact
- Make new hire packets and keep them organized in binders

Canvassers

Are recruited from the communities the projects are based in. The duties of a canvasser include but are

not limited to:

- Go door to door and disseminate information, complete in person survey, collect petitions, educate voters, and/or register people to vote
- Use technology to keep track of homes visited and the status of the door knock (on GOTV)
- Pass out flyers and literature for a candidate or registration drive

Supervisors/Drivers

Must be able to do everything that a canvasser is required in addition to:

- Monitoring and motivating canvassers
- Understanding how to use maps and mapping software
- Leading the crew by example
- Hold themselves and the crew accountable at all times for their actions
- Driving the van safely and departing and returning on time

Compliance Officers

- Collect packets of registration envelopes from van drivers
- Check each voter registration for validity
- Identifies bad registrations
- Enters registrations into system
- Scans each registration into system
- Submit validity reports daily

OPERATIONS

Office Checklist

- ☐ Central Location
- ☐ WiFi
- ☐ Table space & Training space for at least 30 chairs
- ☐ Include at least one secure office to maintain tech equipment
- ☐ Requires secure parking for vans overnight and for workers who leave their vehicles while in the field
- ☐ Ideally on public transportation routes
- ☐ Accessible restrooms

Recruiting Process

- ☐ Create flyer and have local team members post, text and pass them out. Any post, flyer or ad must be approved by GBI Mgmt.
- ☐ Call organizations and churches and ask if they have a job board
- ☐ Find a college and post on their boards
- ☐ Recruit each day to make sure all slots for trainings are filled
- ☐ Make sure there is a phone number and email on the flyer
- ☐ Answer any and all questions when you are contacted
- ☐ Set up training times that last two hours and let them know their options for days and times
- ☐ Expect no-shows when recruiting for training sessions
- ☐ Canvassers/Supervisors must
 - ☐ Be able to operate a smartphone
 - Be sober and of sound mind
 - Speak clear, concise English in a pleasant, audible tone
 - Be able to pass a background check
 - Be neat and presentable
 - Own khaki pants
 - Be able to read, remember and recite a script
 - Have legible handwriting

Training Prep Process

- ☐ Print all Human Resource documents and training materials
 - ☐ Staple the HR documents and put in a pile
 - ☐ Staple the Training documents and put in a pile
 - ☐ Have a pile of literature to pass out to potential canvassers
 - ☐ Have pens ready
-
-
-
-
-
-
-
-
-
-

- printer
- printer
- copies
- project
- Social Security (SS) card & I
- doing this
- ssary)
- d to print legibly
- r ID and SS card
- ch and check the packet th
- ary
- le
- and we use it as proof that t
- them it gets signed once t

der t-shirts

ou have enough copy paper and toner for printer

heets in binders and make a label for it

n sheet for training day

office early enough to check tablets & copier

al canvassers/supervisors

yourself and tell a little bit about GBI Strategies

about the candidate, the client and the project

that we need to make a copy of their Social Security (SS) card & I

that they can't get paid or work without doing this

packet with pens (and clipboards if necessary)

know to fill out everything completely and to print legibly

finish their packets, collect them and their ID and SS card

e of the SS card and ID with company tech and check the packet th

s complete

missing errors and give it back if necessary

ack their ID and SS card

d packages face down in an organized pile

ning Packets

est: Tell them that it is like a timesheet and we use it as proof that t

r cannot get paid unless they sign it. Tell them it gets signed once t

- der t-shirts
- ou have enough copy paper and toner for printer
- heets in binders and make a label for it
- n sheet for training day
- office early enough to check tablets & copier
- al canvassers/supervisors
- yourself and tell a little bit about GBI Strategies
- about the candidate, the client and the project
- that we need to make a copy of their Social Security (SS) card & I
- that they can't get paid or work without doing this
- packet with pens (and clipboards if necessary)
- know to fill out everything completely and to print legibly
- finish their packets, collect them and their ID and SS card
- e of the SS card and ID with company tech and check the packet th
- s complete
- missing errors and give it back if necessary
- ack their ID and SS card
- d packages face down in an organized pile
- ning Packets
- est: Tell them that it is like a timesheet and we use it as proof that t
- r cannot get paid unless they sign it. Tell them it gets signed once t

- ☐ Explain the acceptable ways to collect registrations and that they must understand that duplicated or forged registrations or signatures of voters living outside the district will not be accepted
- ☐ Explain that if we find that you have forged registrations, you will be fired immediately after the FIRST offense. No exceptions.
- ☐ Explain that Canvassers/Supervisors must have the ability to fill out forms legibly and completely while paying
- ☐ attention to detail
- ☐ Show canvassers/supervisors how to knock on the door and speak to a resident
- ☐ Show an example of how to ask for and get a registration or petition completed
- ☐ Go over technology if necessary, train on the app
- ☐ Do role-play with several volunteers (the hesitant or shy ones especially)
- ☐ Canvasser Uniforms: Uniforms will be required for all project related work
 - Campaign supplied T-shirts and personal khakis pants will be worn by all canvassers and supervisors
 - No uniform, NO work!
- ☐ Give canvassers/supervisors the information on when to arrive to work and let them know that if they are late, they will not go out that day. Tell them the pay and that they will be going out for 5 hours
- ☐ Go over the code of conduct and have them sign it saying they agree. Be clear that if any of those rules are broken, they will be terminated immediately.
- ☐ Make sure you have collected everyone's HR sheets and Codes of Conduct
- ☐ Announce that everyone will be contacted before the first shift whether they are hired or not
- ☐ Sit with the team and decide on who cannot be hired
- ☐ Contact all new hires and give them the information they need to show up for the day

Payroll Enrollment Process

1. FIVE things necessary to enroll new hires in payroll
 - ☐ Completed HR Packets
 - ☐ HR binder with clear sleeves
 - ☐ Tech (Ipad or computer with enrollment link)
 - ☐ Paycards
 - ☐ Writing utensil
2. Write the first person's name on the paycard envelope
3. Input the number of the paycard and other info on the HR Sheet into the google doc

4. Put HR packet and paycard in HR binder
 - ☐ ABC order
 - ☐ Paycard first then HR packet behind but in the same sleeve
5. Do the same for all completed HR packets
6. Pay very close attention to detail

Payroll Schedule

- ☐ The payroll schedule goes from Monday to Sunday
- ☐ Payroll is entered daily
- ☐ The following Monday through Wednesday, payroll is to be reviewed with canvassers and supervisors.
- ☐ Payroll is closed out Wednesday evening and no further changes can be made.
- ☐ Canvassers and Supervisors are paid that Friday.

CALENDAR						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Example: For the workweek of the 6-12th:

- ☐ Payroll should be checked with canvassers and supervisors from the 13-15th
- ☐ Payroll closes the evening of the 15th
- ☐ Workers are paid on Friday, the 17th

OPS Doc

- ☐ This is a mandatory document that should be completed in full daily.

Prepping for the Canvass

- ☐ All vans need to be picked up
- ☐ Check the gas amount and get gas if necessary
- ☐ Turn all receipts in to the office lead
 - Office lead writes location and receipt number on the top of the receipt
 - Office lead take picture of the receipt then send in the "receipt" group text with the staff ipad
- ☐ Neatly park all vans together in the parking lot
- ☐ Label each van with a letter
- ☐ Label each key with corresponding letter
- ☐ Put keys in secure location
- ☐ Identify who the drivers will be
- ☐ Pack vans with items on checklist

Van Checklist

- | | | |
|---|-------------------------------------|---|
| ☐ First Aid Kit | ☐ Ponchos | ☐ Cooler |
| ☐ Ice/Waters | ☐ Literature | ☐ Yard Signs |
| ☐ Voter Registration Forms | ☐ Clipboards | ☐ Pens |
| ☐ Tablets | ☐ Mints | ☐ Hand Sanitizer |

Supply Checklist: What Goes in Bins

- | | | | |
|--|---|--|--------------------------------------|
| ☐ Tablets | ☐ Paper | ☐ Rubberbands | ☐ Scissors |
| ☐ Staff Tech (if applicable) | ☐ Surge Protectors | ☐ Packing Tape | ☐ Sharpies |
| ☐ 4-10 port chargers/cords (+1 Ten pk of cords) | ☐ Clipboards | ☐ Painter's Tape | ☐ Black Pens |
| ☐ Paycards | ☐ Ponchos | ☐ Clorox Wipes | ☐ Paper Clips |
| ☐ Printer (power cord and usb cord) | ☐ Ziploc Bags | ☐ Sanitizer | ☐ Post Its |
| ☐ Paper | ☐ Sheet Protectors | ☐ First Aid Kits | ☐ Trash Bags |
| ☐ 3 Ink Cartridges (only 2 if XL cartridges) | ☐ Binders | ☐ File Tote | |
| | ☐ Surge Protectors | ☐ Stapler/Staples | |

Canvassing Process – ALL PROJECTS

- ☐ Arrive at office no later than an hour before canvass goes out
 - ☐ Make sure all vans are gassed up and ready to go
 - ☐ Decide with drivers where canvassers will head that day
 - ☐ Make sure Canvasser Contracts & pens are out and ready to sign
 - ☐ Greet each canvasser and tell them to sign contracts and have a seat and to take it with them on the van
 - ☐ 20 minutes before departure, pull vans to door
 - ☐ Assign even number of canvassers to each driver
 - ☐ Give tablets to drivers if necessary
 - ☐ Let canvassers know how to find their log-ins
 - ☐ Instruct drivers to have canvassers sign the manifest & take a picture
-
-
-
-
-
-
-
-
-
-
-

- ☐ Make copy of manifest and collect it with all canvasser contracts
- ☐ Instruct drivers to depart and at what time to stop canvass
- ☐ Write on top of manifest in black marker: **VAN_, DATE, LOCATION, # OF CANVASSERS+ 1 SUPERVISOR**
- ☐ Enter payroll in while canvass is gone and keep in contact with them
- ☐ Canvassers receive ONE break during the middle of the shift
- ☐ Once canvassers come back, park vans, check gas, collect tech

Payroll Process

- ☐ Sit with Open the Payroll document
- ☐ Pull out pile of manifests/contracts
- ☐ Go to the Correct Date Column
- ☐ Have someone call out the name of the person using a marker to x them out
- ☐ Type in the daily amount & make sure it is in the right column
- ☐ Remember supervisor amounts are more
- ☐ Do the same with all manifests
- ☐ Count how many entries you have for the day. It should match the number of canvassers + drivers

Field Process • Voter Registration

- ☐ Each canvasser gets a clipboard, voter registrations and pens
- ☐ Drivers will drop two at a time off on each street or each site
- ☐ Canvass will consist of a combination of site and neighborhood
- ☐ Canvassers will go door to door or approach citizens informing them of who they are and asking if they are registered to vote
- ☐ Canvassers will walk citizens through filling out the form
- ☐ They have a goal of at least 12 registrations per day
- ☐ One break will be given in the middle of each shift
- ☐ Canvassers do not stop until the off time and THEN drivers come back to office
- ☐ Once they come back, each canvasser is given a manila folder with a registration tally sheet to complete
- ☐ Drivers collect all the folders and turn them in to the Compliance Department

Compliance Process

- ☐ Compliance Officers collect each vans daily packet at the end of each shift
- ☐ Check each registration for completion

- ☐ Scan each registration in the system
- ☐ Enter registration tally information into google doc
- ☐ Report percentage of correct and incorrect and duplicates for each van
- ☐ Bad Registrations:
 - Incomplete
 - All handwriting looks the same
- ☐ If a canvasser has fraudulent or forged registrations, they are to be terminated

x@yehuda_miller

Maintaining Order/Security

- **Irate Canvassers**
 - Isolate the Canvasser
 - Get them away from the group
 - Listen to what their issue is
 - Speak calmly and directly
 - Politely ask them to leave
 - Call Gary, Jessica, an/or Tiffany if you cannot solve the issue or come to an agreement
- **Locking up Secure Items**
 - Lock all Payroll Binders and information
 - Put a password on all computers and laptops
 - Lock all technology
 - Lock the office
 - Lock the vans

Additional Rules and Regulations

NO SMOKING or DRUGS:

- ☐ Do Not Smoke or Do DRUGS in Hotels, Air BnBs, Offices or Rental cars and Vans. If you are caught smoking in any of the above locations, you will go home, no questions asked

STUDY THE MANUAL

- ☐ Practice with your team members
- ☐ Practice in the mirror
- ☐ Learn the procedures until you feel comfortable

BE RESPECTFUL OF EACH OTHER

MANAGEMENT PHONE NUMBERS

Gary Bell - [REDACTED]

Manotte Brilus - [REDACTED]

Jessica Lahens - [REDACTED]

x@yehuda_miller

