BOLD ACTION—MINIMIZING RISK

Security TIPS for Civic Engagement Field Work

Canvassers, Phone Bankers, Administrative Staff

As we enter the 2018 midterm election season, we know the stakes are high, and there are organizations and people out there that want to impair our efforts to outreach to voters – be it a nonpartisan effort or 501(c)(4) partisan effort. There will also be backlash by those who could be unhappy with the results of our efforts. We need to be vigilant and minimize risk to our organizations and the staff and volunteers who are doing this work while also building our base/power and having a bold impact. This worksheet will provide your organization some tips to safeguard your organization and team when phone banking or canvassing.

Training

Repetition is Our Friend! Train, Remind, Train, Remind, Document

- Make sure everyone representing your organization is trained in allowable speech and activities. Know which "hat" you are wearing – be it your nonpartisan 501(c)(3) hat, (c)(4) hat or your private person hat.
- Be sure you have time keeping systems that show when you are working and on your own time.
- Document that you have provided training to your staff and volunteers and reminders of 501(c)(3)/(c)(4) regulations. In a file, keep your training sign-in sheets, agenda to show content of training, memos. If challenged by third parties (i.e. IRS, opposition groups, etc.), this & time-tracking/time sheets will be very important to defending your organization. Here's a Sample Acknowledgment of Ban on Nonpartisan Activities (c)(3)-(c)(4).

One training is NOT ENOUGH. Do regular reminders. We suggest creating a (short) mantra for the top reminders for your canvassers and phone bankers. Repeat it over and over at the beginning of every day/shift. Post it. Here is an example: **BAD ASS:**

Be Alert to Surroundings

Avoid Arguments

Don't Enter Homes & Buildings

Always Stay on Time

Stay on Message!

Stay in Touch with Your Team/Buddy via Signal

Prevention security practices

To safeguard your organization and team, we suggest the following guidelines:

- Keep to the correct (c)(3) and (c)(4) message discipline for this campaign; be clear on language regarding issues vs. endorsements; make sure language is tight and people can say it simply & clearly. We suggest doing role playing as part of the training to help with this.
- Secure all data lists and documents with individual information. This involves keeping a total page count, returning full set to the central box, keeping lists secure in vehicle or office, and assigning a point person for the full set of calling or precinct sheets.
- Secure the team's own personal information/personnel files, and shift sign in sheets. Limit personal information shared about most visible / vulnerable staff to avoid them being targeted.
- Explain your organization's values and practices to protect your organization's most vulnerable team members and to recognize particular circumstances with legal status or sensitivities, (i.e. those on parole, documentation status, disability).
- Building security: Provide constant reminders to keep the door locked and do not open for people you do not know. [Consider video camera and remote locks/bells/mirrors for street door security as appropriate].
    - Check out Roadmap's Tips on Creating Office Safety Protocols
- Do not take video without permission from the organization. Do not record trainings or take photos during trainings. Your organization should post signs that communicate this policy. It will also help with entrapment attempts.
- Have all staff and volunteers sign confidentiality and agreements (Agreements you may need to include: media release form, confidentiality agreement, work standards re: hours etc.)
    - Check out Roadmap's Sample Confidentiality Statement
- Explain who to report any potential security incidents to and what to write down, what not to write down.

Common scenarios to adapt or add to based on your local risk assessment and role playing:

- **Hostile voter/neighbor is aggressive or threatening:** role play de-escalation; assign field team 'point people' to step up during de-escalation situations. Contain and move on.
- **If police are present by coincidence vs. If police are called by an aggressive neighbor.**
- **How to watch for entrapment / harassment** by white nationalists, right wing journalists, etc.
    - Check out Roadmap's Tips on Creating Office Safety Protocols
- Practices to avoid aggressive dogs.
- Medical emergency, car crashes or other injuries
    - To manage this scenario, identify who will carry first aid, assign point person if a volunteer or staff person has an accident or injury. Take notes about key facts and emergency contact people. Immediately report to the Director if serious injury happens.
- Have emergency call numbers to get urgent care while avoiding bringing in the police when unnecessary.

Administrative Logistics:

Be sure to properly classify your paid temporary employees

Be AWARE OF THE FOLLOWING REGULATION: Make sure your temp employees (canvassers, phone bankers) who you are paying are classified as employees and not independent contractors. Their work fits the definition of employee NOT independent contractor. Misclassification of workers can lead to audits, fines and reputational damage.

MATERIALS for canvass team security

The following is a list of administrative forms to reinforce and document safety protocols: work standards re: hours, behavior, timesheets, campaign messaging points, media release form for photo permissions, personnel files including medical coverage, and emergency notification media contact person.

Consider optional materials for the street team: badge or an identifier/name tags; whistles, walky-talkies, armbands for marshals, flags for crosswalks, flashlights for evening shifts, etc.

For more tips and information, here are samples from our RoadMap Toolkit: Social Media Policy, Confidentiality Statement, Volunteer Screening and Protocol, Incident Report Form, De-escalation Methods & Tactics.

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In all cases, be alert and report suspicious incidents, even if just a gut feeling, so the team can see patterns.

While in the Field

Use the Signal app (from Whisper systems) on mobile & desktop devices to Stay in Touch via Secure Communications

It is very important to keep all communications secure. It is very easy for anyone to access or hack into the different types of technology we use on a daily basis. We suggest the app "Signal" as it has proven to be the most secure. You can download the free app on your mobile deivice or computer. We suggest the following protocols:

- Set up several separate Signal groups: a) the daily team; b) the leads and point person back in the office; c) the regular Crisis Management Team plus team leads/ field team leads. If you don't have a Crisis Management team, learn more how to set one up by requesting Technical Assistance from RoadMap at: info@roadmapconsulting.org

- Set the settings so that messages disappear after a week or so. Save key data as screen-shots where appropriate.

Protocols for Incidents

It is not unusual to encounter people who are rude, racist, aggressive, etc. The following protocols can be used to manage these types of situations:

- Use verbal de-escalation techniques and make sure your team is trained on these techniques. This includes having your team to role play for scenarios like handling rude people on the phone or encountering them in person.
- Avoid interpersonal conflicts within the team and avoid personal issues affecting the work; speak upfront with your team lead if you feel uncomfortable or need support. Make it clear to everyone that we are a team.
- In case you face medical emergencies, make sure you know the location of first aid and the nearest hospital, along with the process to report to the most senior staff person on site.
- Make sure to have an emergency plan in case of a natural disaster and make sure this is communicated to all staff and volunteers. For example, explain the protocol for identifying or meeting in a safe space outside of building.

Daily team security tips - before canvassing

- Explain canvassing routines. Use buddies and Signal groups to notify Team Lead.
- The Team Lead should decide if and when it is appropriate to notify the full team to avoid an area, or meet up at a designated spot.

General Security tips: keep the risk area contained (what does this mean?), remove vulnerable people, reinforce de-escalation skills and message discipline on (c)(3) and (c)(4) allowable electoral activity, redirect toward our campaign goals and our values, etc.

NOTE to Field Team Leads - organizational protocols and documentation

- Review security protocols for leads (how to handle emergencies, mental/ physical threats).
- Set up SIGNAL groups, incident forms and other key resources among all leads and key staff.
- Have a list of emergency call numbers to get urgent assistance while avoiding bringing in the police when unnecessary.
- Agree on values and practices to protect vulnerable team members and to recognize particular circumstances with legal status or sensitivities (i.e., those on parole, documentation status, disability).
- Know how to log incident reports, blank form (what does this refer to?) and what should and should not be written down.
- Protect public spokespeople who may be targeted for online or in-person harassment: Limit personal information shared about most visible /vulnerable staff. Set up anti-doxxing protocols for serious attacks.
    - Check out the Anti-Doxing Guide for Activists Facing Attacks from the Alt-Right for more tips and information.
- Keep strategic campaign updates or conflicts out of the meeting notes.

We hope these tips and reminders will help your field effort move forward with confidence and strength!

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