

Indivisible Mobilize Guide

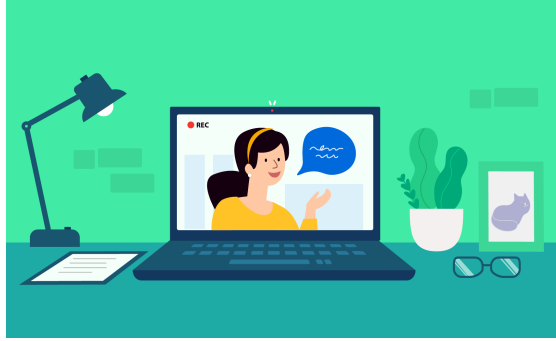


Note: THANK YOU to Swing Blue Alliance and Lisa Kretsge and Susan Labandibar for creating this guide!

Create webinars, online meetings, online fundraisers, virtual phone banks and texting events and postcard pickups.

Contents

Getting Started	2
Creating Your Event	2
Special Questions and Custom Photos	4
Event Dashboard	4
Edit Your Event	5
View Signups and Add Attendees	5
Email Your Attendees	5
Email Attendees from a Single Event:	6
Email Attendees of All Your Past Events	6
Email Attendees from a Single Shift of a Multi-Shift Event:	6
Export Registration and Attendee Information	6
Creating a Custom Event on Mobilize	7
Upgrading Your Account	7
Using Zoom Breakout Rooms	7
Other Resources:	7



Getting Started

Creating an event page will allow you to promote your event, manage signups for your event, send out reminders and private information, and collect feedback from your attendees.

Click [here](#) to create your event.

Creating Your Event

Event Title: Please include the type of event, your first name and your town and state. (example: Phone Bank to turn Florida Blue, hosted by Julia from Arlington MA).

Event Type: Choosing the appropriate event type (Phonebank, Letter Writing, etc). Mobilize will not promote events without an event type.

Event Description: This is the description of the event that appears on the event sign up page. Please make sure to add your name, contact info, and the name of your group to the Event Description.

Location: Select In-Person event for a postcard-distribution or you may receive RSVP's from over-eager out-of-state volunteers. Enter the full address and click "Only Attendees Can See this Location."

If you select a virtual event, enter the zip code under Event Location.

Event Visibility:

- Public events: Will be promoted on the main Indivisible Mobilize page and website MAP
- Private events: volunteers must have the link to sign up for the event.

Event Logistics & Accessibility

Event Contact Phone (not shown to Attendees)

Additional information for attendees:

Add your pickup location, phone bank link, a script, training video, best practices document, or other information for your volunteers.

For a postcard/letter pickup, you can use the following message, which will be inserted into mail sent to attendees:

Please pick up packets from *Your Address* (insert any additional directions that may be helpful to volunteers)

Pickup Times: You may pick up your packets at any time between ____ and ____

Payment method: Please pay with check or Venmo. Make checks payable to *Your Name*, or Venmo at @Your_Name

Here's the message your attendees will receive:

Hi **Name** —

Thanks for signing up for **Event Name** on **Date**

Here are the details of your event:

What: **Event Name**

Contact: **Host Name**, **Host Number**

Add to Calendar: [Google](#) | [Yahoo](#)

[The text you typed above will be inserted here.]

Looking forward to having you!

P.S. If you're no longer able to attend, please [cancel](#).

Special Questions and Custom Photos

If you would like to ask your guests a question, such as how many postcard packets they wish to pick up, you can add the question after you click "Host this Event." Just edit the event and find the option to add a custom field. See *Edit Event*, below.

Alternatively, you can ask guests to register twice. See "Other Options" below.

You can also change the photo for your event. Our recommended size is 1200x630px (or check that the thumbnail looks okay).

NB. You need a user account with Organizer permissions to make these changes. If you would like to upgrade your account, please email luke@indivisible.org

Other Options to List in Your Event Description

Here is a sample event description from Swing Left Rhode Island.

About this event

We CAN hold onto our majorities in the House and Senate in 2022 -- but not without your help. The midterms are closer than they appear. NOW is the time to encourage as many folks in key states to register to vote.

HOW THIS EVENT WORKS:

- The is a contactless "pick-up at a location on the East Side of Providence" event at 273 Morris Avenue.
- On event day, pick up your packet(s) of postcards to write from home.
- Postcards should be written and mailed within one week of pick up, or by the date specified on the instruction sheet.
- Each packet will contain instructions, postcards, addresses, and--while supplies last--40 cent stamps!

THE SMALL PRINT:

- If you would like two packs of postcards, register twice. Be sure you have the time/volunteers to write as many as you reserve. Quantities are limited.
- CANCELLATION POLICY: To cancel, use Mobilize or email renwhitaker@gmail.com. Please be considerate and give as much adequate notice.
- MEMBERSHIP: To become a member of Indivisible X, visit www.indivisiblex!

Thank you, as always, for doing your part to preserve our democracy!

-John and the team at Indivisible X!

Event Dashboard

Your [Event dashboard](#) lists all of your events. Past events are on their own tab. Using the blue buttons at the top, you can email all the past attendees of your events or create a new event.

Events

Export as CSV

Email my past attendees

New Event

Event nameType1 userXLocationMore filters

Upcoming (0) **Past (4)** Promoted (54) Awaiting Review (0) Awaiting Verification (0)

Name and type	Location	Owner	Latest time	All signups	Actions
Pass the For the People Act and Protect Our Democracy Virtual Letter Writing	Cambridge, MA	Susan Labandibar	3/06/21, 10:00am EST	22	
Part Two: Election 2020 Traveler's Tales Virtual Solidarity Event	—	Susan Labandibar +2 co-hosts	12/20/20, 7:00pm EST	198	
Letter Writing with Working America to Flip Georgia Virtual Letter Writing	—	Susan Labandibar +1 co-host	11/22/20, 7:00pm EST	144	
Take Back Pennsylvania From Your Own Living Room - Cambridge Pickup Other	Cambridge, MA	Susan Labandibar	8/07/20, 10:00am EDT	61	

If you can't see these buttons, contact luke@indivisible.org to request an upgrade to your account.

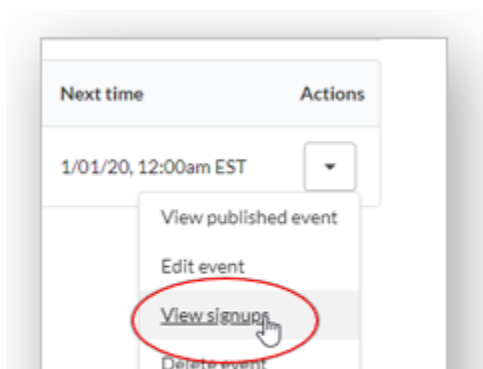
Edit Your Event

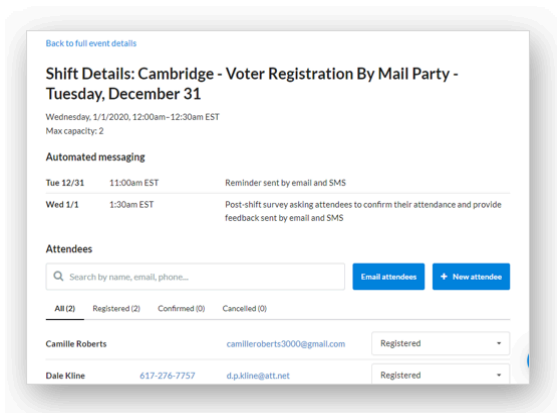
You can change anything that appears on your RSVP page - edit the description, change the address or time, change the maximum attendees, etc. Just go to your [Event dashboard](#), find your event, then click on the black triangle at the right end of the row and select "Edit event" from the pop-up menu. After you have edited your event, save it by clicking "Submit" at the bottom of your event description.

If you change the time or date of the event, those changes will be reflected on the public calendars.

View Signups and Add Attendees

From the **Event Dashboard**, click **View Signups**. This takes you to the Shift Details screen.





To manually add attendees -- either people who respond by phone or email, or who simply show up -- click the **+ New Attendee** button, and type in their contact information.

Email Your Attendees

You can easily send an email to people who have signed up for your event. You can also email attendees of past events.

Email Attendees from a Single Event:

From the [Event dashboard](#), click the title of the event. On the next screen, click the **Email Attendees** button (top right). Compose and send your email. You will get a copy of the email you send.

Email Attendees of All Your Past Events

You can send an email to everyone who attended a past event that you hosted. (Your attendees can choose to unsubscribe from these emails.) You can do this from the Event Dashboard. See the Event Dashboard section above.

Email Attendees from a Single Shift of a Multi-Shift Event:

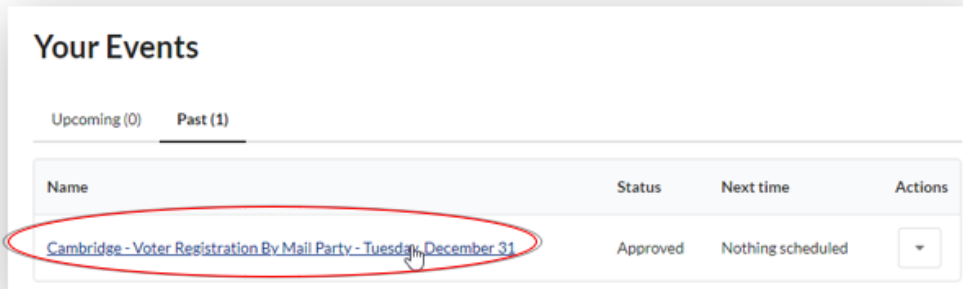
From the [Event dashboard](#), click the title of the event. Scroll down to **Shifts and Signups**. Select a shift. On the next screen, click the **Email Attendees** button (Under **Supporters**). Compose and send your email. You will get a copy of the email you send.

Feeling fancy? You can use [markdown](#) to make stylistic changes to your emails. For best practices on when to email your attendees, see this [article](#) from Mobilize

Export Registration and Attendee Information

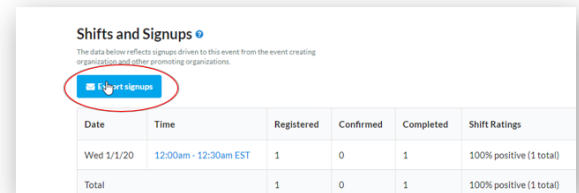
If you use Mailchimp or other bulk email software, you can add your attendees to your email list.

- Go to your **Event Dashboard** and click [Past](#) to get to a list of your events that have already taken place.
- Click the event title to get to the **Event Detail Page**



Your Events			
Upcoming (0)		Past (1)	
Name	Status	Next time	Actions
Cambridge - Voter Registration By Mail Party - Tuesday, December 31	Approved	Nothing scheduled	

- Scroll all the way to the **Shifts and Signups** section at the bottom and click the **Export signups** button
- Mobilize will send you a link to the list. It expires in 24 hours.



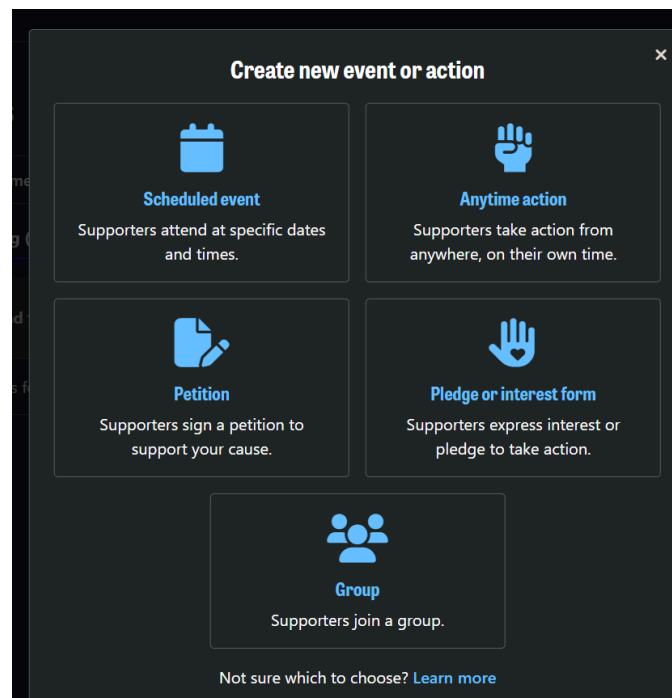
Shifts and Signups					
The data below reflects signups driven to this event from the event creating organization and other promoting organizations.					
Date	Time	Registered	Confirmed	Completed	Shift Ratings
Wed 1/1/20	12:00am - 12:30am EST	1	0	1	100% positive (1 total)
Total		1	0	1	100% positive (1 total)

Creating a Custom Event on Mobilize

If you would like to create your own event, we've made it easy for you. Just go [here](#)

Making Pledges, Interest Forms, and Anytime Online Actions

To make either a pledge, interest form, or online action, simply choose that option after clicking “create an event” and fill in the relevant fields! You can find more information on these [here](#).



Upgrading Your Account

If you would like to create a different type of event or action, you will need an organizer account. Contact the support team at luke@indivisible.org.

Using Zoom Breakout Rooms

See Joel Silberman's excellent guide [here](#).

Other Resources:

[Mobilize Host Guide](#)

[Best practices for messaging volunteers](#)