

Promoting Your Events & MobilizeAmerica FAQ for Texas

txdem.co/mobilize-faq - txdem.co/mobilize-guidance - Responses to frequently asked MobilizeAmerica questions. Have a question related to MobilizeAmerica that is not on here? Fill out a Mobilize Help Ticket at txdem.co/HELP.

| | |
|---|-----------|
| MobilizeAmerica Info | 2 |
| What is MobilizeAmerica? | 2 |
| Benefits of MobilizeAmerica | 2 |
| MobilizeAmerica Setup (For Those Who Are Not Already Setup) | 3 |
| Signing up your organization | 3 |
| Connecting with VAN using an API key | 3 |
| MobilizeAmerica Events | 5 |
| Creating a Mobilize Event | 5 |
| Share your Mobilize Event Link | 6 |
| Promoting other organizations and candidates | 7 |
| Promoting other organizations' events in my district/county | 7 |
| Adding MobilizeAmerica events to your website | 7 |
| Adding organizers to your account | 7 |
| Event Tags | 8 |
| Adding your event to TexasDemocrats.org website | 9 |
| How to submit Fundraising or Ticketed events | 9 |
| How to submit organizing events | 9 |
| County Party Tips | 10 |
| Using organizer accounts for clubs and other activists | 10 |
| County Party Mobilize Support Video | 10 |
| Precinct Chairs, Clubs, and Activists Tips | 11 |
| If you aren't a MobilizeAmerica admin, this is how you add an individual event. | 11 |
| Can't find what you're looking for in this document? Fill out a Mobilize Help Ticket at txdem.co/HELP. | 14 |

MobilizeAmerica Info

What is MobilizeAmerica?

- MobilizeAmerica is an action-management software that helps you reach new supporters and retain existing ones.
- The Texas Democratic Party provides candidates and county parties MobilizeAmerica as representatives of the state party to organize their communities. **Texas candidates, from U.S. Senate to school board, can sign up for their own MobilizeAmerica account.** This granting of MobilizeAmerica is a privilege and can be revoked by the party at any time.

Benefits of MobilizeAmerica

MobilizeAmerica provides campaigns and county parties with:

- Data syncs immediately with VAN, once you've connected it to a VAN API key -- you'll need to request this in VAN, or email vanhelp@txdemocrats.org and the Data Team can assist.
- Allows us to cross-promote events as part of our nationwide network of campaigns and progressive organizations.
****This means your events can be promoted **automatically** on the Texas Democratic Party dashboard and website -- candidates, county parties, national Democratic websites, and more. No more submitting your events on multiple websites or emailing to get your events added.
- Your volunteers receive text message and email reminders about your events to increase attendance.

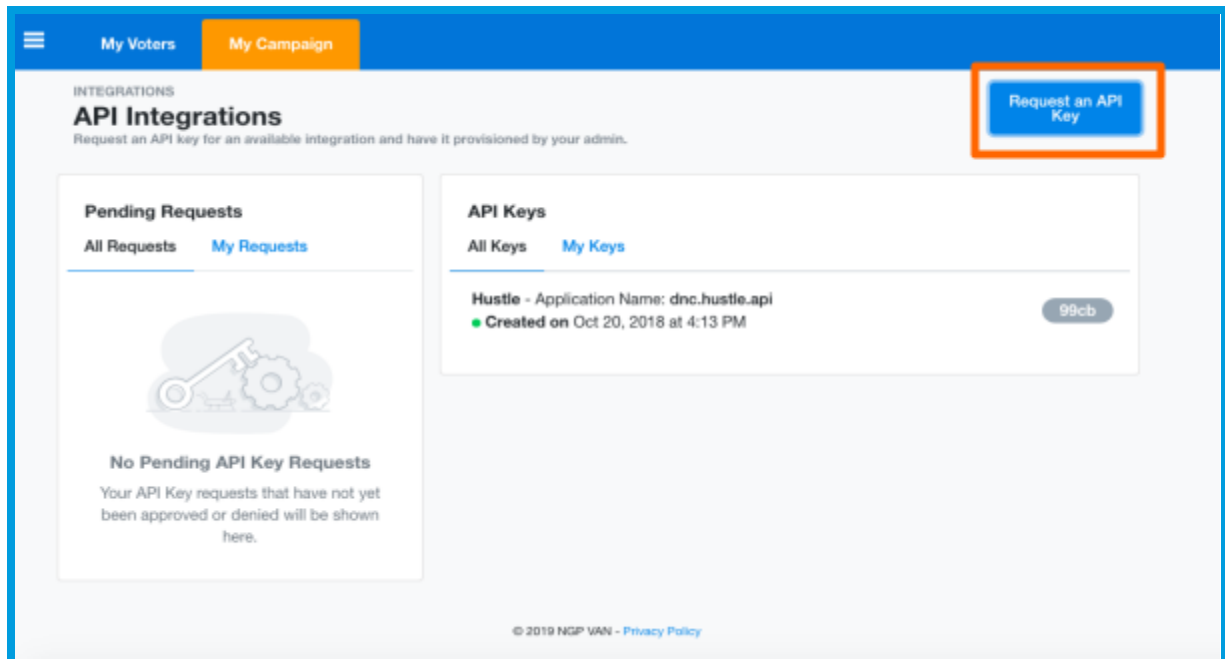
MobilizeAmerica Setup (For Those Who Are Not Already Setup)

Signing up your organization

- Submit a ticket at txdem.co/help to get signed up for an account if you do not have one already.
- If your campaign already has a MobilizeAmerica committee but you have lost access, please specify that in your request. We're happy to help you resume access!
- Once you've accessed your MobilizeAmerica committee, please carefully read the following section on API keys. If you do not set one up, you will not be able to connect Mobilize with VAN.
- If you don't see your events, nicely ask the account owner if they have "promotion" of your account turn on: [Click here to read more about promotions.](#)

Connecting with VAN using an API key

- In order to connect your VAN committee to your Mobilize, you'll need to first request an API key in VAN.
 - Request an API key by searching **API Integrations** in the left hand search bar in VAN. You'll only be able to do this as a Level 1 or Level 2 user, so if you cannot access API Integrations, please contact your VAN admin.
 - You'll then need to click **Request an API key**, specify this is for MobilizeAmerica, and then send the request to Andrea. The page should look like the following:

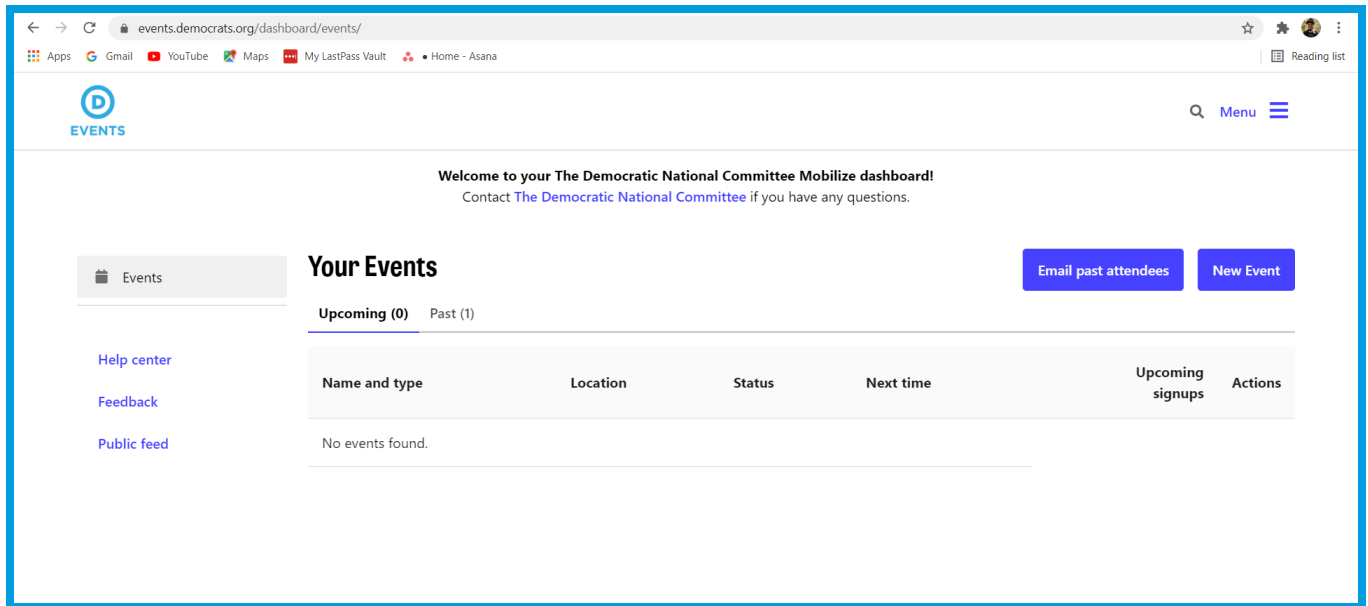


- The TDP Data team should respond within 24 hours with your API key, no need to send a help ticket until 24 hours have elapsed.
- Once you've received an API key, you'll then need to input it in your MobilizeAmerica committee.
 - In Mobilize, navigate to **VAN Settings**, then paste in the API key you obtained from the API Integrations section of VAN.
 - **Please be sure to save this API key. TDP cannot view your API key, nor do we keep a record of it. If you do not save your API key, it will be lost permanently.**
 - Now that your integration has been set up, you'll need to finalize your VAN Settings. We recommend setting up Event Types, such as Phone Banks, Canvasses, and Trainings, and then setting which Survey Questions will be used in your Mobilize committee.
- For additional details on your Mobilize and VAN sync, please check out Mobilize's documentation on the subject here: [Sync your Mobilize dashboard with VAN.](#)
- If you have entered your API key successfully but your integration is still not working, please submit a help ticket here: txdem.co/van-help.

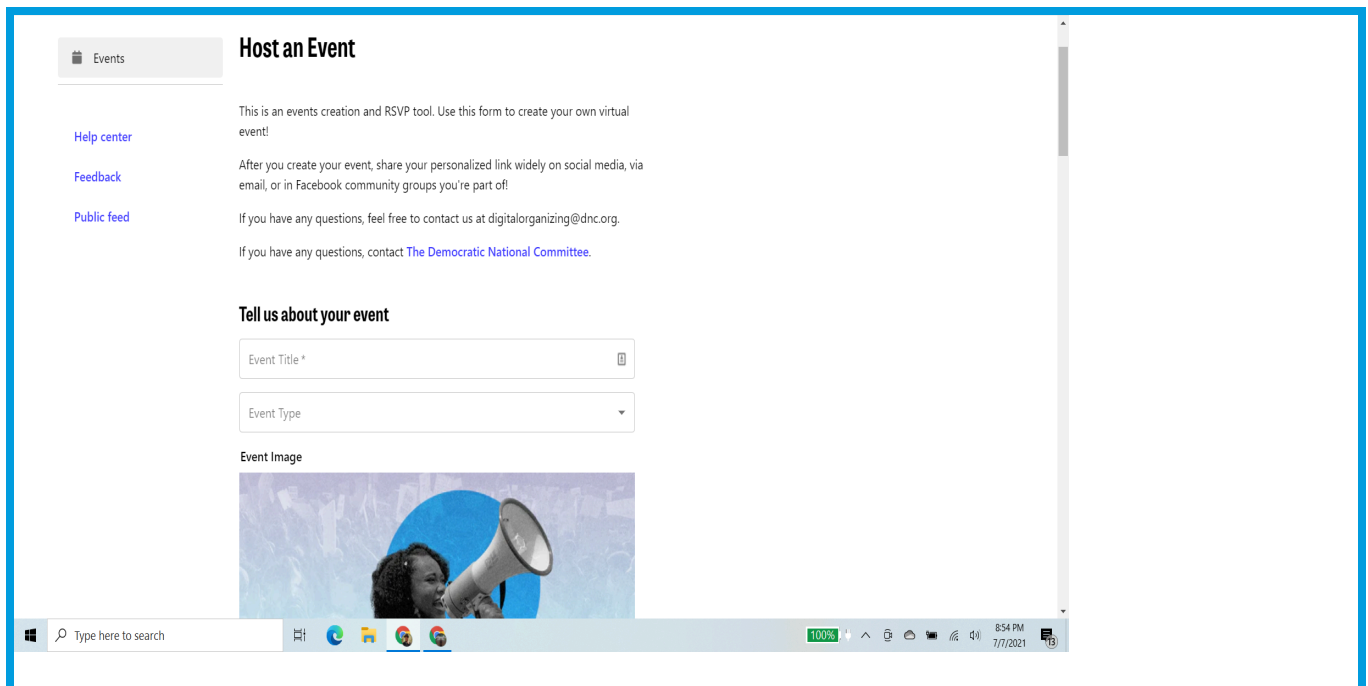
MobilizeAmerica Events

Creating a Mobilize Event

- Once you are logged into your Mobilize account, creating an event is a simple process. First, you will need to go to your account. Once there, you should see a page that looks similar to this:



- Next, you will click the blue button where it says NEW EVENT in the right-hand corner. Once you do, you should see a page that looks like this:



Building a Mobilize Event

- Now that you're in, you will need to take the time to fill out the required information/details about your event. It is important that you provide as much detailed information as possible so that it is easy for volunteers and VDR's to get the guidance they need. Here are a few things to keep in mind
 - **EVENT TITLE:** Make sure that your event title is clear and straightforward. Stay away from Titles that are too long or irrelevant. I.e "Smith County Voter Registration Drive" works better than "Smith County Weekend of Action Day 1 Voter Registration Drive". You can add an image to your event if you'd like but it is not required. For the July Weekend of Action TDP will not be providing images for your mobilize events.
 - **COMMUNICATIONS:** Event Contact Phone: This should be a working phone number (preferably your own, or the person you delegate to be in charge of the event(s)).
 - **DATE AND TIME:** Check and double-check to be sure both the date and time are correct on your event.
 - **ADDITIONAL INFORMATION FOR ATTENDEES:** It is suggested that you ALWAYS put something here, even if it's just a few sentences. Ideas of helpful things to add can include:
 - Please call/text me with any questions or concerns
 - Please share this event with others who may be interested
 - It is forecasted to be very hot, water will be provided for free, but please bring sunscreen.
 - This is the location that currently underwent construction, not to be confused with the other location across town.
 - Each shift is 1 hour minimum. Please keep this in mind when signing up.
- **ADD A CO-HOST:** If you're working with a partnering organization this is especially helpful. It can be your local Dem Club, a Voter Registration Organization, or another group that is also set up on Mobilize. It is not required but may come in useful for those of you who have done coalition building within your communities or if your VR location will be split between counties.

Share your Mobilize Event Link

Once you have your event setup you will be given a special link that you can share out. Don't worry, you can always go back and edit/update event details as needed. This link is important because you can share it out at upcoming meetings and events, email it, text it, and post it on social media and in groups you may be in. The more eyes you get on your event(s), the more potential help you have.

Promoting other organizations and candidates

- For details on how to promote other organizations' events, please visit the following help document on the MobilizeAmerica help page: [How can I promote other organizations' events?](#)

Promoting other organizations' events in my district/county

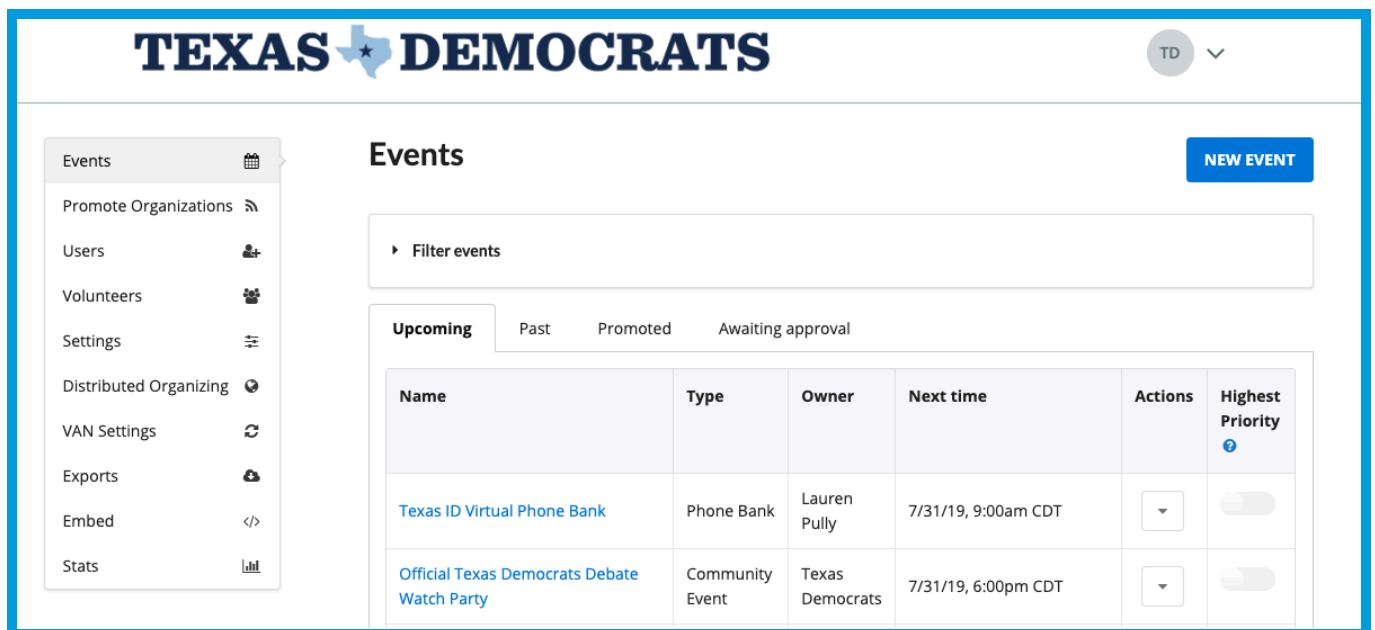
- For details on how to promote other organizations' events in your campaigns' district, please visit the following help document on the MobilizeAmerica help page: [District Filtering Tool.](#)

Adding MobilizeAmerica events to your website

- For details on this option, please visit the Mobilize Help page: [Can I host my events feed on my website?](#)

Adding organizers to your account

- Great for giving super volunteers, local Democratic clubs, and staff the ability to add events to your account. More information [here](#)
- Details instructions:
 - [Step 1](#): Log in
 - [Step 2](#): Click on the "users" tab



The screenshot shows the 'Events' management page in the MobilizeAmerica system. At the top left is the 'TEXAS DEMOCRATS' logo. On the right, there is a user profile icon labeled 'TD'. A sidebar on the left contains navigation options: Events, Promote Organizations, Users, Volunteers, Settings, Distributed Organizing, VAN Settings, Exports, Embed, and Stats. The main content area is titled 'Events' and features a 'NEW EVENT' button. Below the title is a 'Filter events' search bar. There are tabs for 'Upcoming', 'Past', 'Promoted', and 'Awaiting approval'. A table displays the following data:

| Name | Type | Owner | Next time | Actions | Highest Priority |
|---|-----------------|-----------------|---------------------|----------------------------------|--------------------------|
| Texas ID Virtual Phone Bank | Phone Bank | Lauren Pully | 7/31/19, 9:00am CDT | <input type="button" value="v"/> | <input type="checkbox"/> |
| Official Texas Democrats Debate Watch Party | Community Event | Texas Democrats | 7/31/19, 6:00pm CDT | <input type="button" value="v"/> | <input type="checkbox"/> |

- Step 3: Scroll down and look for the “add a user” section. Make sure to set their role to “organizer.” Click invite!

| First name | Last name | Email | Role | |
|---|--|------------------------------------|--|---|
| <input type="text" value="First name"/> | <input type="text" value="Last name"/> | <input type="text" value="Email"/> | <input type="text" value="Organizer"/> | <input type="button" value="Add/Invite"/> |

Adding a user here will grant them access to the dashboard and they'll receive an email with their invite link. Admins have access to everything, while organizers and trusted hosts can only create events and view/edit their own events. Hosts can create events, but each event will need to go through approval.

Event Tags

- **What are they?** Tags specify information about an event other than the type of activity or hosting organization, like “Spanish Language Event.”
- **How to use them:** When creating or editing an event, you'll see a new form field labeled "Tags." By typing in the field or clicking the dropdown arrow, you can select tags from the full list that exist on the site. You can use as many tags as you want. For more information, click [here](#).

Adding your event to TexasDemocrats.org website

How to submit Fundraising or Ticketed events

- MobilizeAmerica is exclusively for organizing events. If you have a **ticketed or a fundraising event**, submit that event here: texasdemocrats.org/events/submit
- Why? Mobilize is not set up to take in funds, so keep it to only free events.

How to submit organizing events

All organizing and free events should be added to your MobilizeAmerica account.

[Click here to get a MobilizeAmerica account: txdem.co/HELP](https://txdem.co/HELP)

The Texas Democratic Party provides candidates and county parties MobilizeAmerica as representatives of the state party to organize their communities. This granting of MobilizeAmerica is a privilege and can be revoked by at any time.

County Party Tips

Using organizer accounts for clubs and other activists

- [Click here to jump to the section on adding organizer accounts.](#)
- *The Texas Democratic Party provides candidates and county parties MobilizeAmerica as representatives of the state party to organize their communities. This granting of MobilizeAmerica is a privilege and can be revoked by the TDP at any time.*
- [Click here to jump to the section on adding organizer accounts.](#)
- If you have a technical question, email txdem.co/HELP

County Party Mobilize Support Video

- **Still not sure where to start?** The modules: “MobilizeAmerica” and “MobilizeAmerica: What is it and How it Connects with MyCampaign” [on the MyCampaign course](#) on our learning platform* walk you through getting Mobilize, connecting it to MyCampaign, and creating your first event. This course is part of the County Chair learning pathway.

**Don't have a login for our online learning platform? Check out the video on txdem.co/training to learn how to create a log-in.*

Precinct Chairs, Clubs, and Activists Tips

If you aren't a MobilizeAmerica admin, this is how you add an individual event.

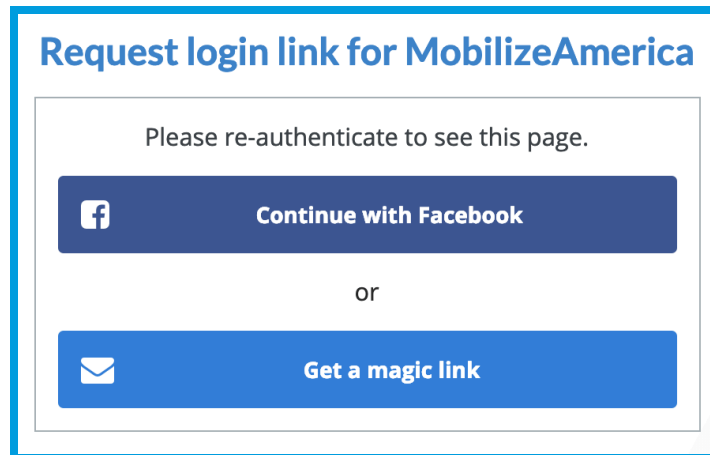
- If you would prefer to have an account with your county party, please email your county party.

If you don't see your events, nicely ask the account owner if they have the promotion of your account turn on.

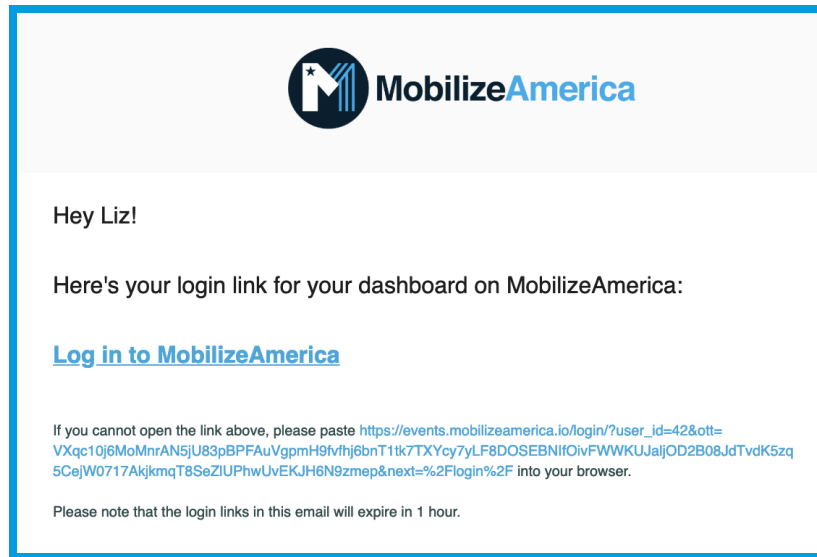
Step 1: Log in

Go to <https://www.mobilize.us/texasdemocrats/event/create/>

And click Continue with Facebook to log in using your Facebook account, or click Get a magic link to log in using your email address. *If you choose to log in using your Facebook credentials, you will be automatically logged into the site.*



If you choose to log in using email, once you provide your email, check your email inbox and you will see an email from Mobilize. Just click log-in to MobilizeAmerica in the body of the email and you will be brought to your Dashboard!



Step 2: Managing attendees

Once your event has been approved by the Texas Democratic Party, it will be posted onto the organization's event list located at events.mobilizeamerica.io/texasdemocrats.

Supporters will then see your event and be able to sign up to attend when they search for actions in their area! You can view a signup list and keep track of who is coming and who has canceled from your Mobilize dashboard.

Once you've logged in, you will see your event listed in the Events tab. Click on your event and you will be brought to the event details page.

Next, scroll down to the bottom of the page and you will see Shifts and Signups. You can click on Export signups to download a CSV list of signups if you would like to have a copy.

Shifts and Signups ⓘ

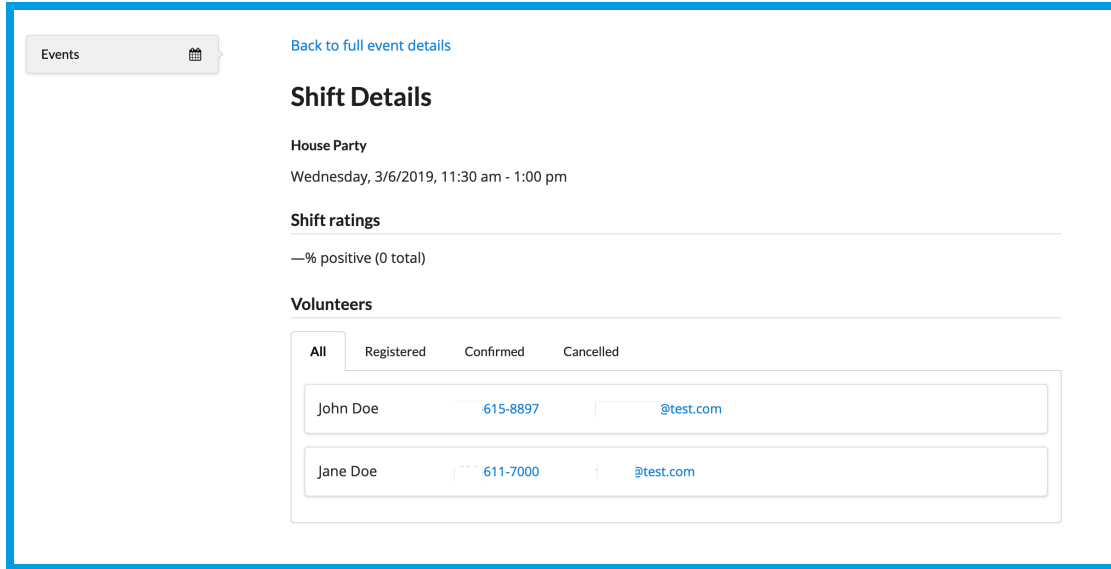
The data below reflects signups driven to this event from the event creating organization and other promoting organizations.

[Export signups](#)

| Date | Time | Registered | Confirmed | Completed | Shift Ratings |
|------------|-----------------------|------------|-----------|-----------|-----------------------|
| Fri 3/8/19 | 11:00am - 12:00pm EST | 8 | 0 | 0 | —% positive (0 total) |
| Total | | 8 | 0 | 0 | —% positive (0 total) |

Next, click on the event Time to view a full, manageable signup list. Here, you can see everyone who has signed up for your event. When someone signs up for the event, they are automatically marked as Registered.

This list includes folks who have accessed the link through the campaign website, an email or text from you, or a link shared by one of their Facebook friends.



Each signup receives an email (and SMS if they opt-in to that on the signup form) from Mobilize the day before the event, reminding them of the details and asking them to confirm their attendance or cancel. They also get your email and phone number in case they need to contact you.

Step 3: Recruiting for your event

If you know a friend is coming to your event, make sure they sign up through your event link so that all your signups will be in one place! Once your event is approved, find the public link for your event on the event details page:

Summerlin Weekly Phonebank EDIT

Link
events.mobilizeamerica.io/obama4congress/event/87437/

Your signup link will direct volunteers to a page where they can enter their information and sign up for the event, like this:

Lubbock Democrats Phone Bank



Join us as we work to identify every Democrat in Lubbock County.

Lubbock County Democratic Party Headquarters
2809A 74th Street
Lubbock, TX 79412

SIGN UP NOW

Brittany



Switzer

britswitz@gmail.com

8324181215

78704

Wed, May 29, 6:00pm–8:00pm CDT

SIGN UP

By clicking the button above you agree to the [Terms of Service](#) and [Privacy Policy](#).

I want to get updates on how to stay involved and agree to receive occasional automated text messages from Texas Democratic Party and MobilizeAmerica. Message and data rates may apply. Message frequency varies. Text STOP to cancel or HELP for help.

**Can't find what you're looking for in this document?
Fill out a Mobilize Help Ticket at txdem.co/HELP.**