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# Introduction

This guide is designed for those who wish to organize members of their community through shared events.

In this guide, you, the event host, can find general instructions and tips to help you prepare for your next event. We'll also provide some specific instructions for one of the most popular event types - phone banks. This guide is organized into three parts in order to assist you before, during, and after the event.

#### This guide includes:

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- A checklist of items you'll need to think through when planning your event.
- Suggestions for promoting and recruiting the event.
- Recommendations for how to incorporate other volunteers into the planning and execution of the event.
- Guidelines for conducting the event and troubleshooting any issues that may come up.
- Tips for reporting and organizing feedback after the event.

# Before the Event: Preparation, Registration, and Materials

# **Preparation**

In order to prepare for your event, you need to first take an inventory of the resources you have. Ask yourself these questions:

#### Venue

Can your venue accommodate all of your guests?

There may be large venues available in your area at little to no cost. Many organizations have community rooms that are available. These include: condominiums and apartments, senior centers, child-care centers, community-service organizations (i.e., YMCA, YWCA, Salvation Army, etc.), churches and synagogues, local libraries, local government buildings.

- Make sure that whatever site you choose is accessible either by public transit or has available parking, preferably free.
- Make sure that the site is handicapped-accessible.
- An indoor meeting is always more convenient than an outdoor meeting.

If your event fills up too quickly and there are no other events in your area, consider moving to a larger venue. Consider contacting all attendees to see if any would be able to host a second event.



Also consider contacting attendees that have offered to help to see if they will co-host a larger event.

#### **Time**

How much time before the event takes place should you start inviting people? It depends on whether the event is public or private. The more time the better.

The time when an event needs to occur may vary based on what type of event it is. A debate watching party will occur in the evening. A phone calling event might take place during the day or on weekends.

#### Multimedia

Make sure your guests will have access to the presentation, i.e., ensure that there is a large screen so your guests can watch a debate.

- Is there a projector or large screen TV available?
- Do you have the correct cables, and does your computer have the correct plugs?
- Do you need a microphone?
- Visit the site ahead of time to test out cables, volume, and internet connection.

#### Communication

Can you ensure communication with your guests before the event? If you encourage your guests to sign up for your event through a signup form, website, or CRM, then you can probably use that tool's messaging capabilities. Remember to be in frequent communication with your guests and update them often regarding event start and end times or any changes that might occur.

#### Refreshments

- Will you be providing food and drinks or will others be bringing refreshments as well?
- Do you need ice, will drinks be pre-chilled and does the venue have a refrigerator?
- Do you need paper plates, plastic utensils, and cups?

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• It's a good idea to ask people to help by bringing snacks and drinks, but don't be offended if they say they're not able to, you never know what their situation may be.

#### **Logistics**

- Reserve enough tables and chairs, or find enough from other local supporters.
- Create an agenda or checklist for the event.
- Do you need people to help you move items and support your event?

#### **Engaging the Help of Others**

While collecting RSVPs ask if folks would be willing and able to help put on the event. It's helpful to have a list of roles in mind before asking, such as potluck coordinator, flyer designer, RSVP confirmation caller, data enterer, or cleanup crew.

It's amazing how quickly something can be set up or cleaned up when people are asked to pitch in.

#### Media

If the event is expecting a lot of people or will be attended by a local official, contact the local media and ask them to attend your event. Usually, you will be able to find a link on the local media websites that says something to the effect of "Email News Tips." This may be found on the Contact Us page of their website. Traditional media will have a news-desk you can contact by phone or email. Send a message to as many news outlets as possible. Local newspapers, radio stations, television, magazines, and Internet bloggers may be interested.

#### **Publicity**

Feel free to promote your event on platforms such as Facebook, BlueSky, Instagram, etc. Make sure to notify us as info@votedanmiller.com so we can help amplify your message.

#### Registration

Make sure that you and your guests register online for the event.

1. Make sure to register your event on our events portal at votedanmiller.com/events.



2. Have your guests RSVP ahead of time so that you can plan accordingly.

#### **Materials**

There are some things you should have ready before your meeting. Different meetings will require different materials. If you don't have these items on hand, you can encourage attendees to bring their own or donate their own spare supplies to the effort.

- 1. Meeting Agenda Always come prepared with a detailed plan of what will be discussed. This will allow for a more professional meeting.
- 2. Voter Registration Materials Pick up voter registration materials from your local City Hall or Clerk's Office, or use the online registration site located <a href="here">here</a>.
- 3. Event Flyers For advertising the event around town.
- 4. Sign-In Sheets print out the template here.
- 5. Clipboards, notepad, and pens.
- 6. Phone lines
- 7. Outlets
- 8. Spare chargers
- 9. Donation envelopes
- 10. Any local campaign materials
- 11. Writing board An easel with a large dry erase board, or an easel with flip-chart paper and large markers, will help keep track of ideas, votes, and results. (E.g., post-it table-top easel.)
- 12. Camera Don't forget to take pictures and share them with us after the event.



# Day before the Event: The Final Steps of Preparation

- 1. Send a reminder email to all guests.
- 2. If your event is large, make sure that you have someone else help you manage the event and also function as crowd control.

# Day of the Event: Ensuring that Everything Goes as Planned

If the event is not at your home, and you are bringing refreshments and computers, plan on arriving an hour early to set up and prepare.

# **Setting Up**

Be sure to have the following materials on hand, they'll make the event go much smoother.

- Sign-In Sheets or Pad Make sure that your guests sign-in, so that you will have a list of
  who attended, and so they can be contacted after the event. Have a pad of paper, or
  printed-out <u>sign-in sheets</u> on a clipboard. Ask for names, addresses, emails, phone
  numbers.
- Issue flyers and/or tri-folds.
- Voter registration forms Pick up voter registration materials from your local City Hall or Clerk's Office, or use the online registration site located <u>here</u>.
- Clipboards, pens and a notepad to take notes.
- Light refreshments.
- Large dry-erase board and markers, or flip-chart paper and large markers, and an easel.

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# **Conducting the meeting**

If time allows, ask everyone to briefly introduce themselves. Begin by saying your name, what city you live in, and maybe an issue they are most passionate about.

Pass around the <u>printed-out sign up sheet</u> and request that everyone get signed in so they can be kept apprised of future events.

Briefly explain the agenda and inform guests about upcoming events, or a future meeting.

Try to stick to the agenda and be courteous of other people's time.

# **Problems during the meeting**

- Technical Problems Identify a technical guru before the meeting. It may be the technical person from the event venue, or it may be someone who self-identifies as 'good with computers'. Ask that person to commit to being available during the whole meeting. If, for example, a video doesn't work, have a "Plan B" for each meeting agenda point, so that you can move on to "Plan B" while the your technical guru is solving the video issue.
- Enthusiastic attendees If someone wants to express their views, let them express their views briefly and then politely move on to someone else's point. Remember to facilitate the meeting, so that everyone can express their views, allowing the event to run smoothly. You could say something like,
- "That's very important/interesting. Thank you for your opinion/thoughts/ideas. Ok, let's move on to another person/comment/idea."
- A supportive, but somewhat-negative attendee keep the discussion moving, and call on another guest to shift the conversation.
- Heckler If hecklers are present, politely ask them to leave. For example "Thank you for your comments, but this is a meeting for Democrats and supporters of the party. I'm sorry, but I have to ask you to leave."

#### **Photos and Media**

Take pictures and use social media to share your experience of the event. You can use #hashtag to share your event in the moment, or afterward, on platforms such as Facebook,



BlueSky, Instagram, etc. Always take a group photo in front of the venue - this energizes the attendees, and is a great way of documenting the event for everyone.

Note about the Press - In this era of citizen journalism and ever-shrinking recording devices, you should assume that the event is being recorded, and that your audience is potentially wider than those in the room with you.

If the event is being held in a private home, you certainly have the right to ask reporters not to enter the event if participants do not agree to media presence. You may wish to ask the reporter to wait outside while you ask the participants whether they're comfortable appearing in a news story, being photographed, having their last names used, etc. In our experience it should be possible to reach an accommodation with the media outlet to follow the ground rules that participants agree to—or to wait outside the event and speak to participants afterward.

- DO find out what outlet the reporter works for
- DO make it clear that you do not speak on behalf of the campaign—but as a participant in this historic process
- DO NOT feel obligated to be interviewed or to continue an interview if you realize you would like to stop
- DO NOT hesitate to decline to comment on something you're not familiar with



# After the Event: Reporting and Organizing

- Thank all your guests for coming to the event and ask them to sign-up online as
  volunteers at <u>votedanmiller.com/volunteer</u>. If you've collected names on one of our <u>sign</u>
  <u>in sheets</u>, please take a picture and email it to us at <u>info@votedanmiller.com</u> so we can
  enter their information into our system.
- 2. Get some feedback from your guests, and provide some feedback to the campaign, so that they can improve this guide and your experience.
- 3. Ask your guests to also publicize the event through the use of platforms such as social media.
- 4. Remember to check your email and respond to any questions that may be asked by attendees following the event.
- 5. If your event was covered by local media, send links of the news articles or video to the attendees and friends to keep publicizing the event.
- 6. Send out a quick overview of what occurred during your event to volunteers that may have missed it.
- 7. Take a breath and consider the great work you accomplished!
- 8. Host another event!