

TIPS & TRICKS

Managing Virtual Events on Mobilize

Taking a few extra steps when setting up your virtual event on Mobilize will help your event succeed.

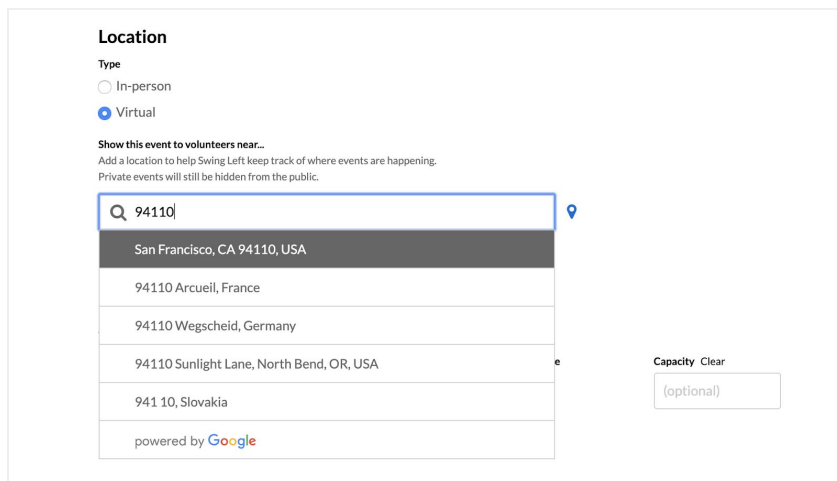
[There are specific tips customized for Virtual Letter Writing Parties here.](#)

Set Up Your Event & Send Automated Confirmation Emails Explaining How to Join the Event

You can easily post a virtual event on Mobilize so that it shows up for volunteers in your area and let them know how to join the party by including information in the automated email that volunteers get when they register for the event.

Here's how:

- Start by setting up [your virtual event here at the "host" buttons.](#)
- Edit the "Event Title" and "Description" field as you see fit, but we've provided an example. We recommend you include information identifying the event as a virtual event to ensure it shows up on our calendar.
- In the "Location" section, please choose a "virtual event" but also **please include a location (full address not required) by typing your city, state, and zip in the "Show this event to volunteers near..." field.**



The screenshot shows the 'Location' section of the Mobilize event setup form. It includes a 'Type' section with radio buttons for 'In-person' and 'Virtual' (selected). Below this is a text input field for 'Show this event to volunteers near...' with a search icon and a location pin icon. The input field contains '94110'. A dropdown menu is open, showing a list of location suggestions: 'San Francisco, CA 94110, USA', '94110 Arcueil, France', '94110 Wegscheid, Germany', '94110 Sunlight Lane, North Bend, OR, USA', and '94110, Slovakia'. At the bottom of the dropdown is a 'powered by Google' logo. To the right of the dropdown is a 'Capacity' field with a 'Clear' button and a '(optional)' label.

Type
<input type="radio"/> In-person
<input checked="" type="radio"/> Virtual

Show this event to volunteers near...

Add a location to help Swing Left keep track of where events are happening.
Private events will still be hidden from the public.

Q 94110

- San Francisco, CA 94110, USA
- 94110 Arcueil, France
- 94110 Wegscheid, Germany
- 94110 Sunlight Lane, North Bend, OR, USA
- 94110, Slovakia

powered by Google

Capacity Clear
(optional)

Location

Type

☐ In-person

☒ Virtual

Location name (optional)

Location name

Street address (optional)

Provide a complete address or intersection (e.g. "1234 Main St." or "Grove St. and Pine St.")

Street address

Address line 2 (optional)

e.g. Floor, Apt., Suite

City

San Francisco


State/Territory

California

ZIP Code

94110

[Reset location search](#)



- The location information helps the Swing Left website recommend your virtual event to volunteers in your area. Without a zip, our website can't tell which volunteers to show the event! Note that Mobilize will make the street address private automatically for "virtual" location events. You do not need to indicate that the address is private. Here's how it looks on Mobilize:

Virtual Community Event - Volunteer organized



Time

Thu 5/14, 7-9am

Location

Virtual event
Join from anywhere
Hosted in San Francisco, CA 94107

- Complete the date and time fields.
- Under "Event Logistics & Accessibility," provide your contact phone.

Date and time

Enter a single time, or add multiple if your event occurs more than once.
Timezone is determined by the event location.

Date

Start time

End time

Timezone

Capacity Clear

03/21/2020

2:00 PM

4:00 PM

Pacific Time

15

+ Add another time

Event Logistics & Accessibility

Event contact phone

650-555-5555

Will be sent via email to anyone who signs up.

Additional info for attendees (optional)

To participate in this virtual letter writing party, you'll need to download and print letters, gather materials ahead of time, and join the party on a video conference using *[Insert Name of Video Conferencing tool]*.

Will be sent via email to anyone who signs up.

- Also under “Event Logistics & Accessibility” we recommend using the **“Additional info for attendees (optional)”** section to provide information about how volunteers need to prepare for your virtual event and how they attend, such as a Zoom/video conference link and/or instructions to download letters if this is a letter writing party. **The information you provide in this field will be sent out in the registration confirmation email when someone registers for the event similar to the example shown below.**

You're confirmed! Registered on Sunday, May 3, 2020 for Swing Left's National Virtual Letter Writing Party!

Swing Left <email.replies@mobilize.us>
to me

May 3
Sun


Swing Left's National Virtual Letter ...
View on Google Calendar

When Sun May 3, 2020 1pm – 3pm (PDT)
Where Virtual event
Who Colleen McCarthy*

Yes Maybe No More options

Agenda
Sun May 3, 2020

No earlier events
1pm Swing Left's National Virtual Letter ...
No later events



Hi Colleen —

Thanks for signing up for [Swing Left's National Virtual Letter Writing Party!](#) on Sunday, May 3, 2020, 4:00 PM Eastern time (1:00 PM Pacific time).

Here are the details of your event:

What: Swing Left's National Virtual Letter Writing Party!
Contact: Swing Left National
Add to Calendar: [Google](#) | [Yahoo](#)

Thank you for signing up to join us at our national virtual letter writing party!

To participate in this virtual letter writing party, you'll need to download and print letters, gather materials ahead of time, and join the party online on a video conference using Zoom.

GETTING YOUR LETTERS

We recommend getting started now as it may take several days to get approved as a volunteer with Vote Forward. Here's what you need to do:

1. Sign up with Vote Forward at <https://swingleft.org/votefwjd> as soon as possible. 2. Once you are approved as a volunteer, please download 20

Here's an example template you can use for the "Additional info for attendees (optional)" section:

To participate in {{event name}}, you'll need to join the party on a video conference call using {{Insert Name of Video Conferencing tool}}.

You will be able to join the event through this video conference link on {{name of video conferencing tool}}: {{include the link and dial-in information on how to join the video conference if applicable}}. If you need help using {{insert video conferencing tool name}}, there's more information here: {{Insert link to video conferencing tool help}}.

[If applicable: You'll also need to take the following steps before the event to prepare {{include additional information here}}. We recommend getting started now as it may take several days.]

If you have any questions, feel free to reach out to me!

For example:

To participate in Sally's virtual house party, you'll need to join the party on a video conference call using Zoom.

You will be able to join the event through this video conference link on Zoom: <https://zoom.us/ABCDEFGHJK>. If you need help using Zoom, there's more information here: <https://support.zoom.us/hc/en-us/articles/201362193-Joining-a-Meeting>.

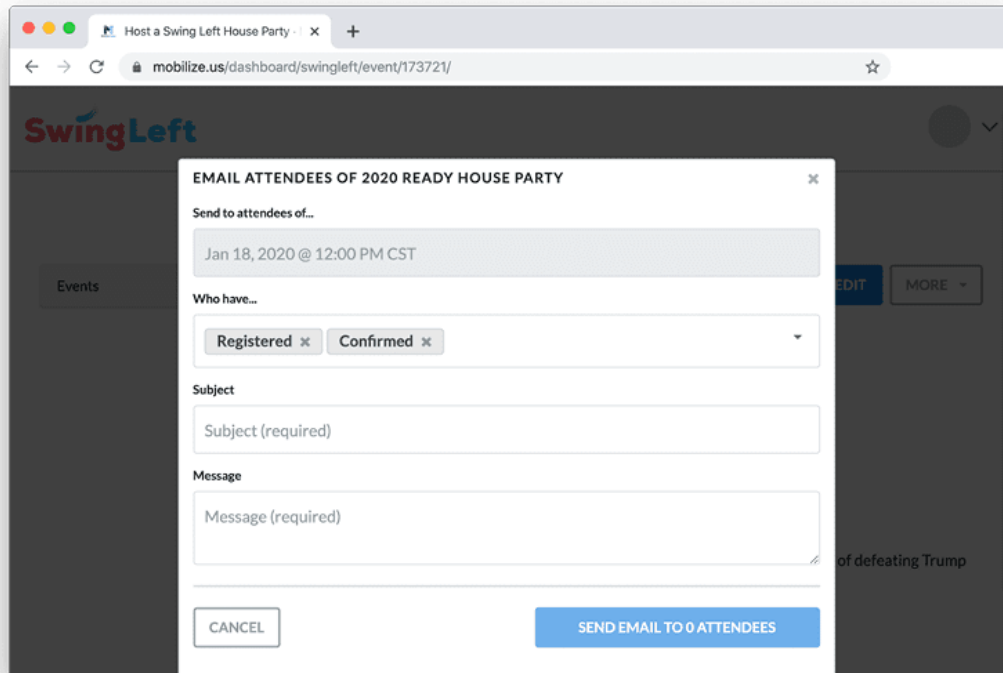
If you have any questions, feel free to reach out to me!

- Choose whether you'd like to list this event as public or private.
- Once you've posted the event and volunteers have started to sign up, we recommend you remind attendees of anything they need to do to prepare for the event at least one additional time.

Communicating with Volunteers Before and After the Event

We recommend you remind volunteers about the steps to prepare for an event by email before the event. There are two ways to do this:

1. Send emails directly through [Mobilize](#). Hosts can send emails to attendees directly through Mobilize—without having to download the list of RSVPs and paste them into an email. To email your attendees through Mobilize's built-in tool, visit Mobilize's event review page and click the blue "EMAIL ATTENDEES" box. A pop-up will appear that allows you to filter who receives the email and send a custom note. If you need more help with this, check out Section III in the [Mobilize Guide](#).



Email attendees

- Download a list of your attendees and email them. You can use [a tool like Yet-Another-Mail-Merge \(YAMM\)](#) to email your attendees and track whether they've opened the email. Visit the event review page in Mobilize, scroll to the bottom, and click the blue "EXPORT SIGNUPS" box. A link will be sent to your email that will allow you to download a CSV file of RSVPs that you can open in a spreadsheet like Excel or Google Sheets. If you need more help with this, check out Section III in the [Mobilize Guide](#).

Shifts and Signups [?](#)

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

[EXPORT SIGNUPS](#) ✓ Email on its way

Date	Time	Registered	Confirmed	Completed	Shift Ratings
Sat 1/18/20	12:00pm - 2:00pm CST	0	0	0	
Total		0	0	0	

View attendees

Here's a suggested email template you can customize and send to your volunteers **before your event**:

Subject: My {{Event Name}} on {{Event Date}}

Hi {{Name}},

Thank you for signing up for {{event name}}. To participate, you'll join the event through a video conference using {{Insert Name of Video Conferencing tool}}.

You can join the event through this video conference link on {{video conference tool}}: {{include the link and dial-in information on how to join the video conference if applicable}}. If you need help using {{insert Video Conferencing Tool name}}, there's more information here: {{Insert link to video conferencing tool help}}.

[If applicable: You'll also need to take the following steps before the event to prepare {{include additional information here}}. We recommend getting started now as it may take several days.]

If you have any questions, feel free to reach out to me!
{{Your Name}}

Here's a suggested email template you can customize and send to your volunteers after your event:

Subject: Thank you and follow up

Hi {{Name}},

Thank you for joining {{Event Name}} and making it a success!

[If applicable: Here are the next steps I mentioned in our call: {{list action items}}.]

And finally, please Join my next event: {{include a link to the Mobilize event for your next virtual event}}!

If you have any questions, feel free to reach out to me!
{{Your Name}}