



FIELD ENGAGEMENT

ORGANIZING GUIDE

The grassroots energy of activism is inspiring and we need to spread the word and recruit our friends and neighbors to take action. The purpose of this guide is to provide you the necessary tools to harness grassroots energy in order to make the difference you want to see in your community. Channel energy in three steps: connect, engage and mobilize.

CONNECT by reaching out and having a personal touch with your list of activists. If you don't have a list, create one based on your network. Engage others in the community who may already be active. A simple email or phone call is a great first step. Every connection should have a next step. The level of commitment from activists should be low, and continue to build on their engagement over time.

ENGAGE your volunteer base and bring everyone together. Consider inviting them to a conference call, House Meeting, or community service events. Volunteers love to help the community. Another volunteer event to host would be a House Meeting. This gives volunteers access to be a part of a team, and it will make them feel appreciated. At the end of any volunteer event, be sure to include clear next steps and events for volunteers to plan and attend.

MOBILIZE by taking action and make plans to continue to take action. Now is the moment to engage and set the groundwork for mobilization in making a difference. Ask yourself, what can we do now to get the team active? How can we provide structure to that activity? Always be thinking about how to get them engaged, and keep them engaged by having events.

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TAKE ACTION! 20 TASK CHALLENGE

You are a megaphone and your organizing work is a force multiplier. When you speak with a friend and neighbor, you are amplifying your efforts to connect, engage and mobilize future activists.

Take the 20 Task Challenge! Challenge yourself to complete these 20 tasks, and once completed you actually complete 60 actions and engage with 30 people. Find two friends to join you and you will engage with 90 people from your community. Let's get to work!

March into '18

1. Donate at <http://www.dccc.org>
2. Sign up to support the March into '18 Program at <http://action.dccc.org/petition/march-into-18>
3. Contact an organizer
4. Adopt a March into '18 district
5. Sign up for state party email updates
6. Subscribe to Democratic Member email updates

Social Media

7. Like the March into '18 Facebook page
8. Follow @dccc on Twitter
9. Follow @dccc on Instagram
10. Set up Facebook page to communicate and share information
11. Set up Twitter list to follow local reports, activists, and partner organizations
12. Create on a team #hashtag

Organize

13. Encourage 20 people to register to vote
14. Host house meeting with 10 neighbors
15. Host trainings for 10 activists
16. Organize meet-and-greets with other local activists to build relationship and work together
17. Attend a training or two in the community
18. Create a monthly calendar of events and meetings
19. Encourage people to bring a friend to events and meetings
20. Find affordable or free places to host events, meeting, or trainings

EVENT PLANNING CHECKLIST

Hosting events is a great way to connect and engage your network and other like-minded individuals. Below are some helpful steps to consider before, during and after an event.

Before

- Plan an event.** What are your goals for the event? What is the best format for that engagement? House Meeting? Day of Service? Phone bank? Day of Action?
- “Know the rules”** for the event you are hosting. Are there restrictions or guidelines to what can be brought to the venue? Are you expected to provide anything?
- Invite and recruit attendees.** Ask invited attendees to spread the word and bring others with them to the event.
- Prepare materials and supplies** 24–48 hours prior to the event. Print sign-in sheets [template included in this packet]. Who is the audience? What type of information is important to gather?
- Cover compliance basics.** Be sure to know the federal source restrictions and contribution limitations; Are there costs associated with the event space that will need to be paid for by the campaign? Are there other costs involved for the event that should be reported by the campaign as in-kind contributions?
- Tell the story** of your event on social media, if you so choose. The beginning of the story should highlight excitement for the upcoming event, and possibly invite attendees by sharing event details.

During

- Always use sign-in sheets!** Always carry sign-in sheets and a pen or pencil with you.
- Take photos and videos** of the event. Consider sending a photo or video in a thank-you follow up note to the attendees. Share great photos and videos on social media.
- Take notes** about the event. What was great? What lessons have you learned? What practices should you repeat?
- Invite** all attendees to attend the next event or way to take action at the current event. It’s always easier to get them to commit on the spot than following up and asking later.
- Tell the story** of your event on social media. The middle of the story will talk about the actual event, how much excitement there is and make sure it makes others wish they were there!

After

- Log and record** sign-in sheets into a spreadsheet. Having this spreadsheet will make life easier when you need to find a name, phone number, email address, photo or story.
- Follow up** with any action items from the event. Good follow up skills creates an environment of accountability. They will tell their friends and they will surely find you more activists.
- Invite to attend next event.** You probably already invited them at the event, but it is a good reason to follow up. Also, reach out to those you thought were coming but did not, and invite them to the next event. Reaching out to invite them will help ease that embracement and keeps them engaged with the team.
- Tell the story** of your event on social media. Tell the end of the story by sharing what a great event it was and how much fun everyone had, and always thank those who attended.

WORKING WITH PARTNER ORGANIZATIONS

WORKSHEET

There are most likely partner organizations already established in your community that you should be working with to reach your organizing goals. They potentially could provide supplies such as paper for flyers, food for volunteers, or funding. Another resource they might offer is information on a specific issue you are trying to help change or staff who have a particular skill set that is necessary to make your event successful. Some of these organizations might be established within the community, so partnering with them would add credibility to your event or they could introduce you to other organizations in the community who could be helpful.

Remember, anything of value that a campaign or political committee receives from an outside organization may be an in-kind contribution subject to the source restrictions and amount limitations under federal law. Accordingly, be careful that we only take in-kind contributions from permissible organizations registered with the Federal Election Commission. Also, we should be sure that we do not coordinate with an outside group making independent expenditures.

LIST OF POTENTIAL PARTNER ORGANIZATIONS

| Established Groups | New Groups |
|---|---|
| [Established before 2017] | [Started in Jan. 2017] |
| State, Local and County Parties, Labor Unions | Local Indivisible Chapters, Swing Left |
| <ul style="list-style-type: none"> • • • | <ul style="list-style-type: none"> • • • |

What resources and support do you think this organization might be able to provide?

- Supplies
- Information/Skills
- Event Attendee Recruitment or Meeting Location
- Community Credibility
- Other

What resources and support could your organization provide to them?

- Supplies
- Information/Skills
- Event Attendee Recruitment or Meeting Location
- Community Credibility
- Other

Who do you know at this organization?

Name:
Email/Phone Number:

Relationship:
Goals:

WRITING A PLAN

WORKSHEET

Make a Plan

What type of event are you planning?

- Community Service Event
- Constituency Event
- Day of Service
- House Meeting
- Phonebank
- Rally
- Roundtable
- Senior Center
- Town Hall
- Other

What are the goals of the event?

- 1.
- 2.
- 3.

What are the details?

Date and Time:

Location:

Make a list of resources needed:

Recruitment Plan

What tactics are you using for recruitment?

- Phone calls
- One-on-one meetings
- Existing networks
- Digital tools

Confirmation Steps

- Send out initial email/Facebook invitation.
- Send a reminder a week out from the event.
- Send a reminder the day before the event.
- Send a day-of-event reminder to everyone making sure everyone has all the event details.

Follow-Up Plan

- Send thank-you email with photos and videos to everyone who was invited and attended.
- Have a next event prepared to invite people to when you send out this email.
- Ensure campaign finance issues have been addressed and reported.

PLANNING MEETING AGENDA

SAMPLE

Attendees: 5–50

Audience: Local activists engaged in taking action

Host/Facilitator: 1 to 2

Duration: 90 minutes

Goals:

- Engage participation and information exchange by the participants
- Generate plans for future mobilization efforts

Preparation: While your attendees may be eager with questions, it is useful to have one or two prepared questions at the ready that you could use, if needed, to stimulate or guide the discussion. Example of questions:

- What are ways we can get volunteers excited to join our movement?
- What type of events could we use now to build our volunteer base?
- What types of community service events would be best to host and participate in?

Next Steps: At the end of any volunteer event, be sure to include clear next steps and events for volunteers to plan and attend. Have a monthly calendar of events available for viewing. Sign-up attendees to join the next event!

Agenda:

0:00 – 0:10 **Settle In**

- Introduce yourself and make sure that guests sign in. They'll have a chance to sign up to volunteer for future scheduled events.

0:10 – 0:20 **Welcome and Introductions**

- Welcome everyone once it seems like most people have arrived. Have your guests introduce themselves and say their name and why they are excited about taking action.

0:20 – 0:80 **Discussion**

- Develop thought-provoking, open-ended questions to get at and discuss the issues surrounding these topics. Be detailed in the formulation of the questions.
- Harness the excitement and energy from brainstorming and encourage participants to mobilize.
- Convey the urgency and importance of why community members are important, and how the culture and community they create will have a lasting impact.

0:80 – 0:90 **Next Steps and Close**

- Thank everyone for attending and be sure everyone is committed to attend the next event!

HOUSE MEETING AGENDA

SAMPLE

Attendees: 5–100

Audience: Grassroots Activists

Host/Facilitator: 1 to 2

Duration: 60 minutes

Goals:

- Introduce and engage your neighbors on why you are taking action
- Ask neighbors to join you and take action in the near future

Agenda:

0:00 – 0:15 [Sign In, Settle In](#)

- Introduce yourself and make sure that guests sign in. If there are issues and events that they know they're particularly interested in getting involved with, they can indicate those here.

0:15 – 0:30 [Welcome and Introductions](#)

- Welcome everyone once it seems like most people have arrived. Have your guests introduce themselves! Each person should say their name and why they are excited about taking action.

0:30 – 0:40 [Share Your Personal Story](#)

- Take a couple of minutes to share your personal story and why you decided to get involved and take action. Also share why you decided to host this House Meeting. Hosts share their story to build relationships with their guests.
- A crucial part of your event will be sharing your story, facts about the issues that are important to you, and how others can get involved. Letting your guests know why you're taking action, getting involved and why you decided to host this House Meeting will help build relationships and create common experiences—and make them that much more likely to go from attendee to volunteer!

0:40 – 0:55 [Hear From Your Guests](#)

- Use this opportunity to talk to others and use the gathering to brainstorm and hear from other community members and stakeholders. Make sure attendees know how to get involved in upcoming events, while also planning upcoming events.

0:55 – 0:60 [Close and Next Steps](#)

- Thank everyone for attending.
- Be sure everyone is signing up for the next event!
- Create email group of attendees and people invited to the event.
- Send an Email that night or the day after the event. Be sure to include:
 - Action Items [future events people signed up to plan or attend]
 - Date of the next meeting

CAMPAIGN TOWN HALL AGENDA

SAMPLE

Attendees: 10–100

Audience: New Grassroots Activists

Host/Facilitator: 1 to 2

Duration: 90 minutes

Goals:

- Provide a forum for new activists to come together and hear local updates
- Empower new activists to take action by providing training and resources

Preparation:

- Engage with local progressive groups and invite them to attend
- Identify and confirm speaker for a Community Update or Civics Lesson
- Have tangible next steps to close out event

Agenda:

0:00 – 0:05 **Settle In**

- Sign-in all attendees

0:05 – 0:10 **Welcome and Introductions**

- Event hosts welcome attendees and share the goals of the Town Hall.
- Hosts share their personal story and why they are involved.

0:10 – 0:20 **Community Update OR Civics Lesson**

- Guest speaker shares updates from the community. Updates can range from local races, issues, and happenings OR
- Guest speaker [possibly a local college professor] shares political knowledge in a short civics lesson

0:20 – 0:65 **Training**

- Provide training to grassroots volunteers to support local activity. Consider the following topics:
- Digital Storytelling and Digital Best Practices
- Telling Your Personal Story
- Volunteer Recruitment and Relationship Building
- What other trainings are needed in the community?

0:65 – 0:80 **Q + A**

- Take questions from participants

0:80 – 0:90 **Debrief, Next Steps and Close**

EMAIL INVITATION BEST PRACTICES

Email Your Event Invitation

Your email should be clear and concise for a specific event or call-to-action event. The email should include at a minimum the below information:

- **Sender:** This is from you! Spend the first line introducing yourself to your local community members and friends.
- **When** and **Where** the event will take place.
- **How to attend:** include a link (potentially a Facebook event link) so those who are interested can RSVP. Having a ball park head count before the event occurs is always important for planning logistics. Include directions or a map to the event.
- **Why!** Don't forget to remind potential attendees why their voice and participation matters. This is your chance to build a relationship and create meaning for the event before it takes place.
- Don't forget any required **disclaimers**.

Post an Event on Facebook

Facebook is a social networking website that makes it easy for you to connect and share with your family and friends online, with connections to Friends. With over 1.79 billion active users, you should also use Facebook for your outreach efforts. It is a great tool for conveying information about upcoming events, marches or Days of Action.

- Creating events and monitoring who has RSVPd. Events on Facebook allow you to set a date, time and location for an event.
- When posting an event on Facebook after it has occurred be sure to include:
- What the event was (House Meeting, march, Day of Action)
- How many people came (approximations are OK!)
- Unique details on specific photos

EXAMPLE

Greetings! My name is Lucy Ives and I am a mom of 3 young active boys, who are always on the go. I've lived in Austin my entire life and want to do everything I can to ensure that keeping Austin weird continues throughout my boys' lifetime. You are invited to a House Meeting on April 27th at 1:00PM. My address is 1234 Bee Cave Road. I'd love to come together, connect and hear from you how we can help keep this city weird! Please reply back to this email or call me at 555-0000. All are welcome so bring a friend or two with you who love Austin just as much as we do.

All the best,

Lucy

P.S. If you are on Facebook here is the link to RSVP: <https://www.facebook.com/events/123>

CALL SCRIPTS

Aside from the event plan, every event also needs a recruitment strategy. Making recruit phone calls is typically how grassroots organizers get a portion of event attendees. Recruitment calls also give you an idea of how many people will be attending the event. Create a call list by using a personal rolodex or reaching out to an existing network.

Recruiting Event Attendees

Hi! May I please speak with [NAME]?

My name is [NAME] and I'm a volunteer/neighbor with [ORGANIZATION] here in [LOCATION].

We are having a House Meeting to make plans to take action in our community. The meeting will take place on [DAY] and [TIME]. Can you join us?

(if yes) That's great, do you have a pen so I can give you the meeting/event details? The House Meeting is at [ADDRESS]. We look forward to seeing you at [TIME]. Thanks for being an activist in our community.

(if no) I'm sorry to hear that you won't be able to make the meeting. Our next meeting is on [DAY, TIME, ADDRESS] and hope you can attend. We will keep you posted about our future Days of Action! Thanks for being an activist in our community.

Confirming Event Attendees

Call or contact event attendees 24 hours prior to the event. This confirmation call will help remind attendees of the event. If your attendees communicate better via email or text message, consider using email or text message.

Hi! May I please speak with [NAME]?

My name is [NAME] and I'm a volunteer/neighbor with [ORGANIZATION] here in [LOCATION].

We have down that you'll be joining us for a House Meeting on [DAY] at [TIME]. There will be delicious snacks available to energize you to make a difference – you will be able to join us?

(if yes) Great! We'll look forward to seeing you then! The House Meeting is at [ADDRESS]. It's going to be a lot of fun!

(if no) I'm sorry to hear that. We are really counting on your support to help make a difference in our community. Could you make it to our next House Meeting on [DAY] at [TIME]?

House Meeting Details:

Thursday, November 16th, 1:00PM, 1234 Bee Cave Road

Next House Meeting:

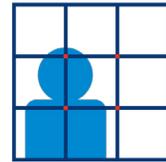
Saturday, December 16th, 12:00PM, 1234 Bee Cave Road

CAPTURING AN EVENT: Tips and Tricks

You might not be a professional photojournalist, but you can be a good photographer—and you don't need a fancy camera! When combined with free apps, today's camera phones are convenient and perform well enough to capture excellent photos. Posting great photos will be important to your storytelling of the event. TIP: consider sending a photo or video in a thank-you follow up note to the attendees. Great photos and videos are also excellent for sharing on social media.

Setting Up the Shot

To “frame” the shot, use the “rule of thirds.” Pretend your camera screen is divided into three sections vertically and horizontally and then use the crossing lines to point to your subject. This is especially important for close-ups but can also help frame shots with a speaker and the audience. The primary points of interest on your screen sit along the “third” lines.



Be aware of your environment. Get rid of distracting backgrounds and clutter. For example, avoid trees that look like they are growing out of heads when they are in the background. Change angles to avoid window glares from across the street. Keep that mess well out of the frame of the picture, and you will end with a nicer, less cluttered photos.

Watch the light behind your subject! If the subjects are in front of a window or a lamp, the shot will come out dark. Move to the side or a different angle so the photo will be better lit.

Taking the Shot

Stay away from zoom. Do not use the zoom function. Due to the nature of the camera, the zoom is much lower quality and the shot becomes much harder to keep stable and smooth. Fill the frame with your subject. Get closer to your subject. If your photos aren't clear enough you are not standing close enough.

Get posed photos at the beginning and end. That allows everyone to relax during the event, which will give you the opportunity to capture quality candid shots. Getting both candid and posed photos will give you a larger array of photos to choose from.

Use burst mode! Use burst mode to capture a collection of different expressions, poses, and improve the odds of getting a fantastic shot. The more photos you capture this increase the opportunity to find the best shot to highlight this great event!

FACEBOOK BEST PRACTICES



Facebook is a social networking website, with 2 billion users, that makes it easy for you to connect and share with your family and friends online, with connections to Friends. Using Facebook for outreach efforts is a great tool for conveying information about upcoming events.

Complete Timeline profile. Upload your up-to-date profile photo and cover photos. Note that it's called a Timeline because it includes important information such as milestones and memories that span the lifetime of your Facebook profile.

Find Friends to keep News Feed up-to-date. The more Friends you have the more content you will see on your News Feed. Your News Feed is your personal view on Facebook and it's based on what you are like and prioritize.

Customize your News Feed. Facebook works on an algorithm and it determines what is most important to you. You can edit your News Feed by going to the top of your homepage and clicking on "sort." You can sort by "top stories" or "most recent."

"Like" is powerful. Clicking "Like" is showing support of posts, articles and activities. Strive to provide content that will be liked by many—maybe even hundreds.

Tagging is a method to mention other people in your posts. When another person is tagged they are directly linked to the post. The more people who are tagged, the easier it is to engage. Make sure you tag only when it is appropriate.

Know how and when to post. Posts should be short and get to the point. Post with fewer characters have a higher engagement rate over longer posts. Post in the afternoon or early evenings to reach the most people. Don't post at the same time; this comes off as robotic.

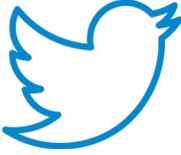
Use hashtags and pictures to make your posts searchable and entertaining. Hashtags make your posts more #playful and #poignant. Include images whenever possible to catch the attention of users. The interaction rate for posts with images is 87% over post without images.

Ask questions to keep your friends and followers engaged and interactive. Question posts that allow the audience to "fill in the blank" will receive more responses from your Friends. Get to know your audience!

Create events and monitor who has RSVP'd. Events on Facebook allow you to set a date, time and location for an event.

Go Live with Facebook Live. Share a live video experience with your audience in real time. Live gives you the opportunity to reach new followers.

TWITTER BEST PRACTICES



Twitter is an online social networking service, with 328 million active users, that enables users to send read short, 280-character messages called “tweets.” Twitter is a tool to get short messages out to your followers. Campaigns can use Twitter to effectively tell the story of their candidate, recruit volunteers, and publicize events.

Update avatar from the default egg to a picture of you. This makes your account personal and give a face to your tweets. It also makes your profile legitimate and more professional if there is a picture of yourself.

Utilize Twitter Bio space of 160 characters to tell who you are and share your interests. Share affiliations with other twitter handles and hashtags. Be creative!

Add a background image to your account. The background image is a second picture that you add after your personal photo.

Know the lingo on Twitter and feel comfortable using it. Here are just a few examples: retweet (RT), tweet, hashtag, follower, Direct Message (DM), and @reply. A RT is a reposted or forwarded message. Followers are the people who subscribe to someone else’s tweets. A DM is a private message between you and another user, that only you two can see. The @reply is a response to another user’s tweet.

Use hashtags to make your tweet searchable. Hashtags are also a way to make your tweet more #playful and #poignant.

Use a period before @username if starting tweet with the @username. A period at the start of the tweet allows others to view the tweet, without a period only people who follow you and the person you are tweeting at can view the tweet.

Explore what’s trending. Keep up-to-date on what is trending by exploring the trends. Trends customized just for you. Twitter uses an algorithm based on your location and who you follow.

Stay up to date with Moments. Moments are the top stories or topics that are popular and relevant on Twitter. You can scroll through the different moments and click on any of the Tweets to view more details.

Keep tweets short and compelling. A short tweet can make an impact! Be sure to keep each tweet focused on one specific message. Include links to websites or blogs if you want to have a longer message conveyed. Add pictures, videos, or GIFs to your tweet. This will give your tweets personality.

Ask questions and run polls. Be interactive with your followers. Tweet open-ended questions or use Twitter polls to survey readers on a specific topic. Bring your readers into the conversation and learn what their opinions are.

EVENT CHECKLIST

Connect before

- Choose date and time for event
- Find a location
- Make a recruitment plan and goal
- Make a list of personal contacts to invite to event
- Make a list of resources that will be needed for event
- If there are any technology supplies needed; projector, speakers, extension cords, etc.
- Reach out to personal contacts
- Prepare and create materials such as agendas, sign-in sheets, flyers and signs
- Send reminder emails to attendees with directions to event
- Confirm event attendees 24 hours before event
- Print and prepare all materials 24 hours before event
- Tell the story of the event on social media. The before content should highlight excitement for upcoming event.

Day of the Event

- Ensure all materials arrive early at event location
- Audit supplies
 - Sign-in sheets
 - Posters/Signs
 - Directional arrows, if needed
 - Pens and makers
 - Name tags

Engage during the event

- Sign-in all attendees
- Take photos and video of the event
- Collect stories from attendees
- Keep activities focused and goal-oriented
- Be present and listen
- Invite attendees to next event
- Tell the story of the event on social media. Talk about the actual event excitement, making others wish they were they were there.
- Have fun!

Mobilize after

- Log and record sign-in sheets
- Follow up with any action items as a result of event
- Thank attendees for coming and invite to attend next event
- Tell the story of the event on social media. Share how great the event was, and how much fun everyone had!

EVENT FLYER BEST PRACTICES



NAME YOUR EVENT

Be creative! Bring your event to life by giving it a name or slogan.



INCLUDE NECESSARY DETAILS

Include the date, time, and location of the event. Include a way for attendees to RSVP or contact information in case someone has any questions. If there are any guest speakers, be sure to highlight that! Be sure to include any required disclaimers.



BUILD THE EXCITEMENT

Build the excitement by explaining why attending this event and participant's participation is important. This is your chance to build a relationship and create meaning for the event before it takes place.

INVITATION SAMPLE

EDIT THIS DOCUMENT TO REFLECT YOUR NEXT STEPS TO DISTRIBUTE AND POST

JOIN US



FOR A **HOUSE MEETING!**

**Hear from our neighbors
on how to best take action!**

Professor Smith guest speaker and short civics lesson

Linda Johnson will lead us in a training on best practices on social media

Bring a friend!

Tuesday, November 7

7:00pm to 8:30pm

123 Main Street

Please RSVP and post questions here:

<https://www.facebook.com/events/555>

“TAKE ACTION” FLYER SAMPLE

EDIT THIS DOCUMENT TO REFLECT YOUR NEXT STEPS TO DISTRIBUTE AND POST

TAKE ACTION

HOW TO GET INVOLVED



ANNOUNCEMENTS

Announcements! Share any updates here. Are there upcoming events, trainings or meetings? Provide the date, time and locations of all events.



SIGN UP

Sign up to support DCCC's March into '18 Program. For more information: <http://action.dccc.org/petition/march-into-18>



SUPPORT LOCAL ORGANIZATIONS

Support local organizations and get involved. Share information on how to connect with local organizations already taking action.



TAKE ACTION

Meet one-on-one with a friend and neighbor to talk about taking action and making plans to speak with additional friends and neighbors.



TAKE ACTION

Attend a training to learn more about taking action locally using best practices.

SIGN-IN SHEET

NAME

PHONE

EMAIL

INTERESTED IN

| NAME | PHONE | EMAIL | INTERESTED IN |
|------|-------|-------|---|
| | | | <input type="checkbox"/> Phone Bank <input type="checkbox"/> Canvass <input type="checkbox"/> Attend Training <input type="checkbox"/> Other |
| | | | <input type="checkbox"/> Phone Bank <input type="checkbox"/> Canvass <input type="checkbox"/> Attend Training <input type="checkbox"/> Other |
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