How to Use Trello for Advocates

How to use this tool

This guide will teach you how to use Trello to plan projects for your organization. Trello is an online tool that is kind of like a big whiteboard. It will talk about how each function works, and how to use them for a project. These are the functions that will be covered:

- Using Boards, Lists, and Cards
- How to Add Documents and Comment
- Adding People
- Tagging People
- Adding Deadlines
- Adding Checklists

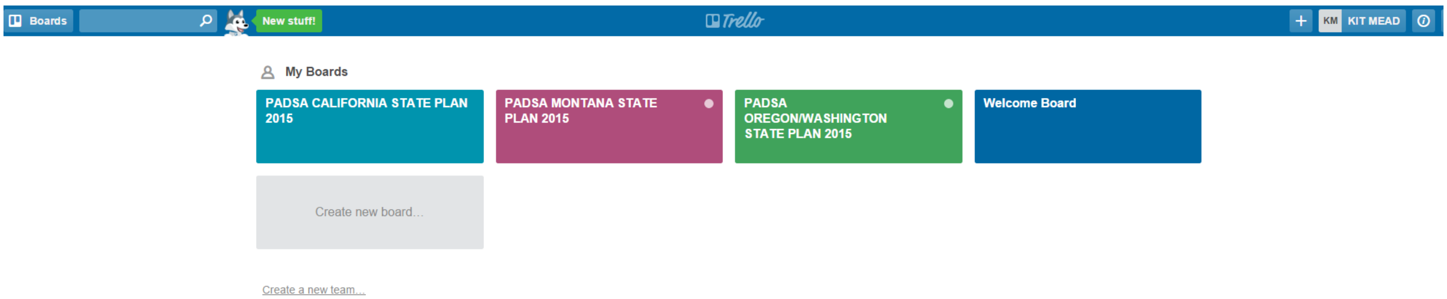
all with specific examples and illustrations.

Boards

The first thing you should do is make a Board for your project. Boards are the biggest sections to put things in. Boards allow for projects to be separated, or for big ideas to be separated.

Each project or big idea should have its own board. For example, if your self advocacy organization has a plan for self-advocacy in your state, you might make a board for your plan.

In the picture below, you can see an example of a Trello with 4 boards: one for each state plan in the Pacific Alliance, and one "welcome" board, which teaches you how to use Trello.

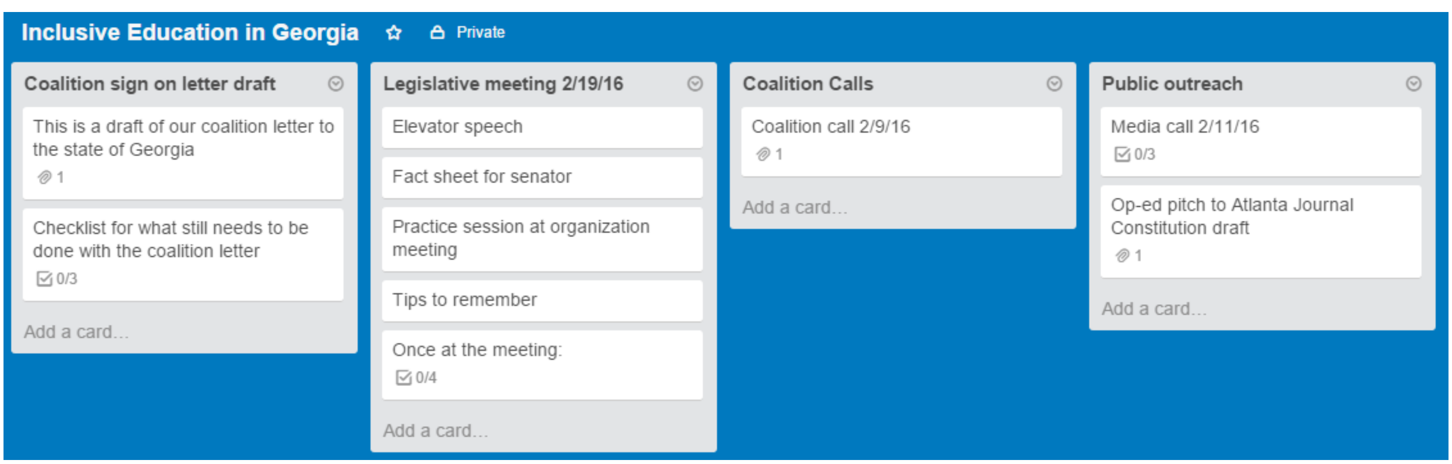


Lists

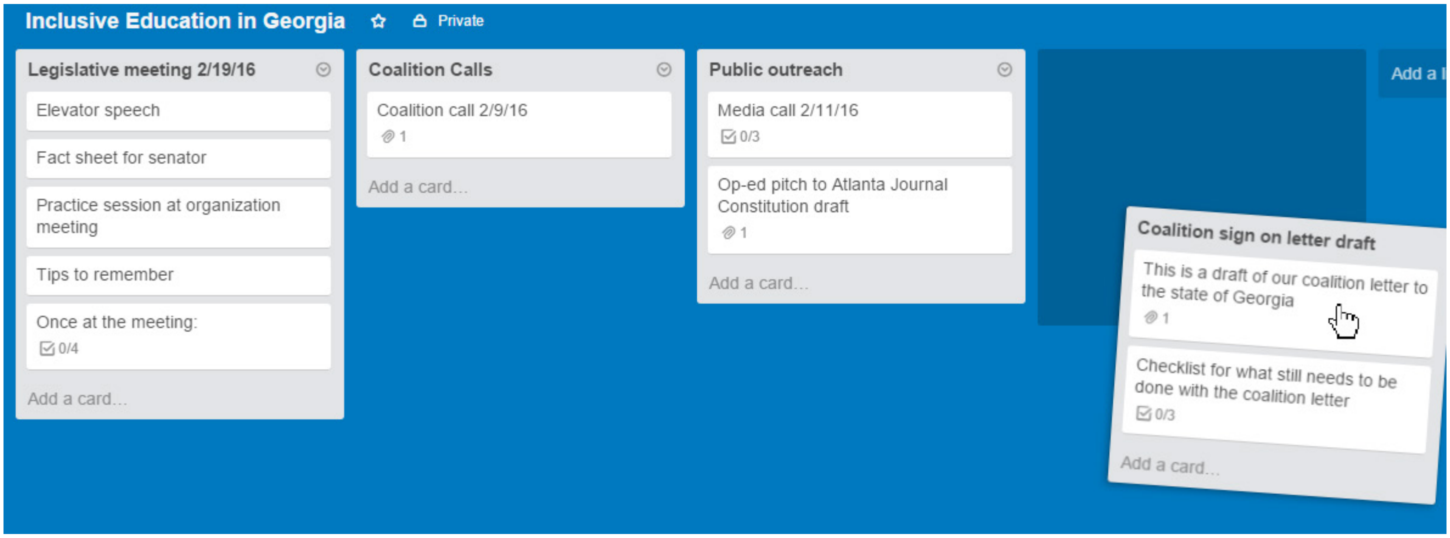
Lists are the next step. Lists are a way to organize all of the steps in a project, or all of the smaller ideas in a big idea. One board can have many lists.

Below, you will see a board about an advocacy plan for Georgia. The advocacy plan has 4 parts, so this board has 4 lists.

Each list shows a different part of the advocacy plan: a coalition letter draft for other organizations to sign onto, legislative meetings, coalition calls, and public outreach.



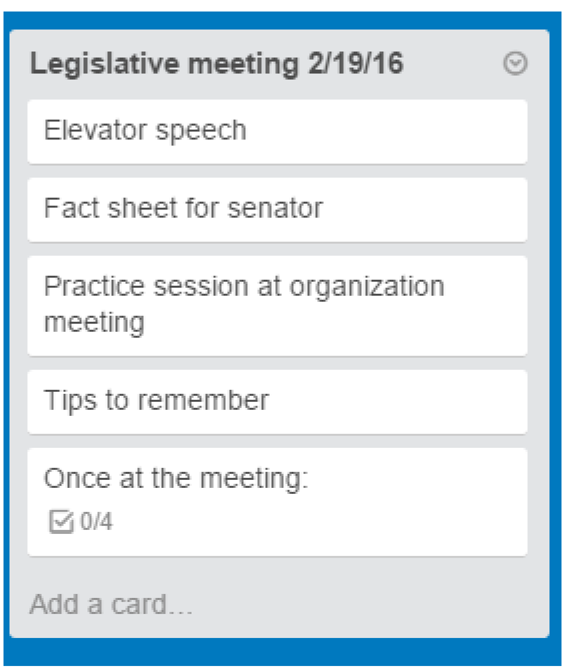
Lists can be dragged and re-organized with the click of a computer mouse. For example, if we wanted to move the coalition sign on letter draft from the left side of the board to the right, we could just click on it and drag it over to the right.



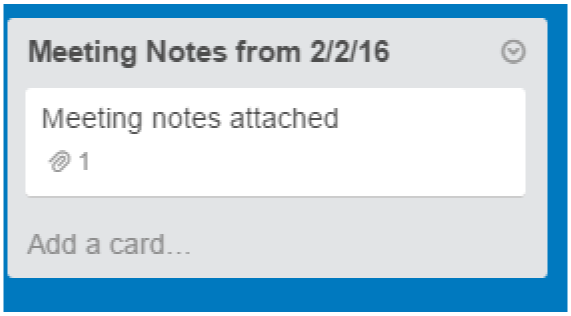
Cards

You can add "cards" to Lists. A card is a place to talk about a specific step in a list, or a place to talk about a smaller part of an idea. Usually, each list will have several steps or smaller ideas. You should give each step or idea its own card. For example, let's look at the board advocates created about Georgia.

In list 2, the advocates are planning for a visit to their state senator. In list 2, they list all the different steps they need to take to get ready. Each step has its own card. There is a card for writing the elevator speech, writing the fact sheet to give to the senator, a practice session at their meeting before meeting the senator, tips to remember at the meeting, and a checklist for what they need to do at the meeting.



A different group of advocates in Georgia is using their board to share information on inclusion in school. They are using their board to organize an idea. Each list is about a different part of the idea. In list 1, they post an update after every meeting. Each update gets its own card.

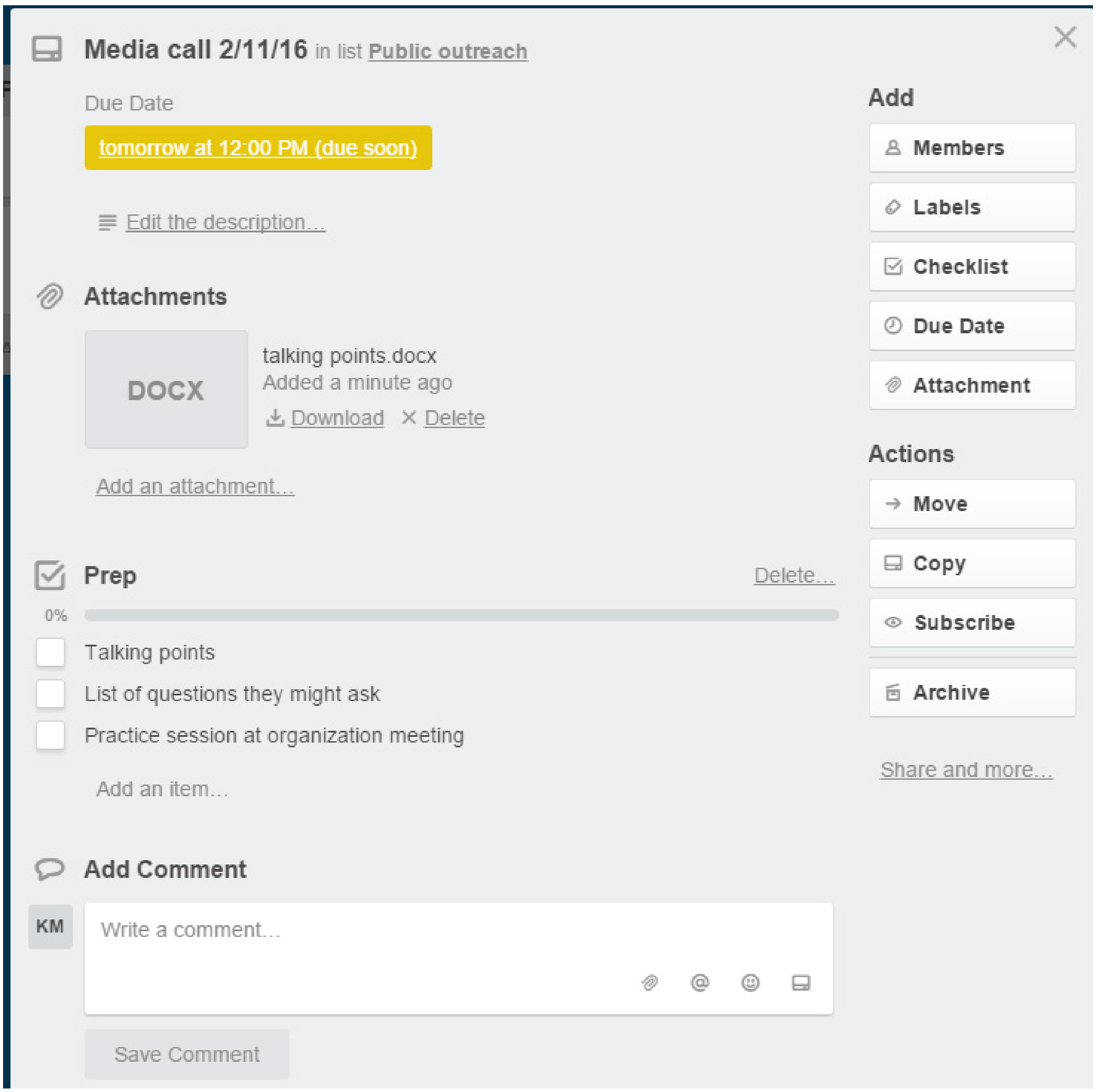


To add a card, there will be an option to “add a card” under the list topic or existing cards. For example, if we wanted to add a new update to list 1, we could just click on list 1 and click the “add a card” option when it comes up.

Things you can do with cards

Since cards are a place to talk about specific steps in a plan or specific parts of an idea, they have a lot of features. These features can make it easier to keep track of things. Some of the things you can do are:

- add documents
- add comments
- tag people
- set deadlines
- make checklists.

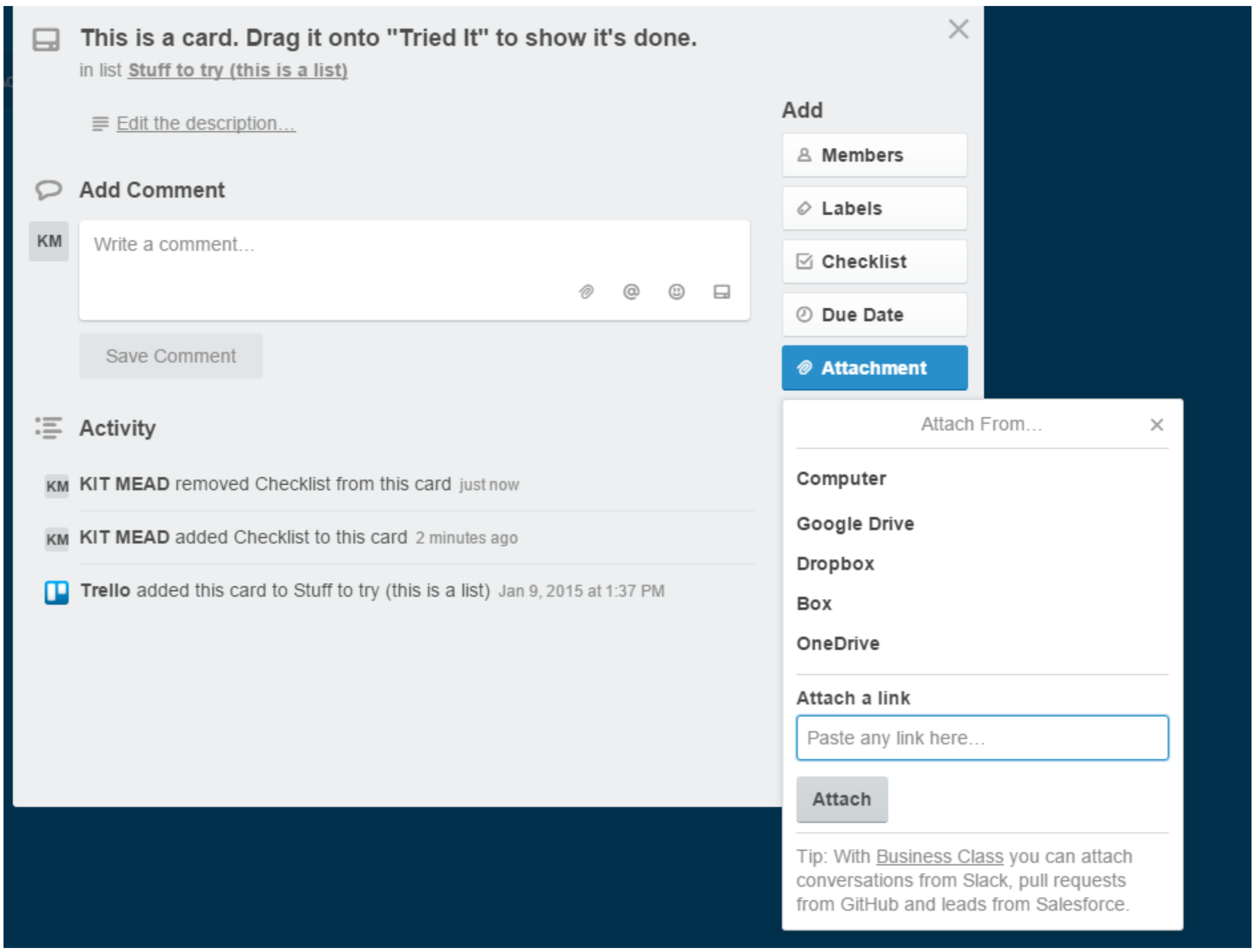


Adding documents

First, let's learn how to add a document. Adding documents can be helpful if you have a document you want everyone on your team to read. It is hard to write long things on Trello, so adding a document can be easier.

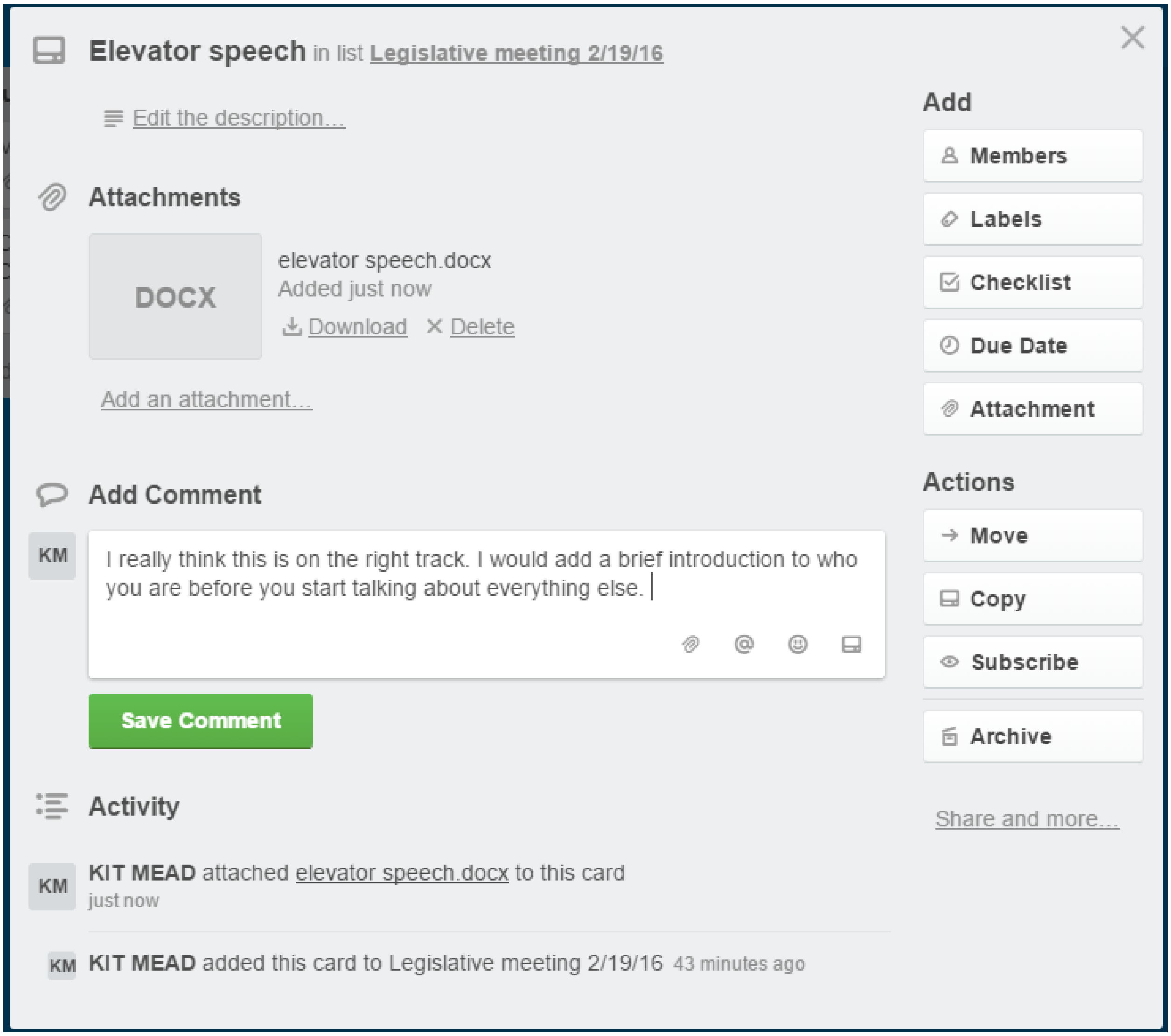
For example, if the group working on inclusion in schools wanted their group to read a letter from the Department of Justice about inclusion, they could attach it to the card with the most related update.

Adding documents is a multi-part process. First, you have to go to the card you want to add a document to, and click "add attachment." Then, you have to find the document on your computer or wherever else you put it. Select the document, and click attach.

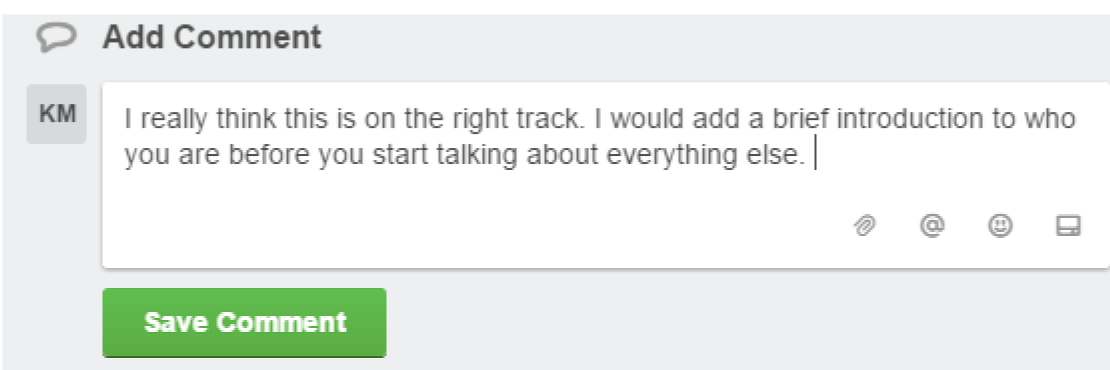


Adding comments

You can also add comments to a card. Comments can be a good way to update other people about the step or idea you are working on for that card. For example, in Card 3, the group is trying to write an elevator speech for their visit with the state senator. Person adds a comment to the card to share their idea for a speech.

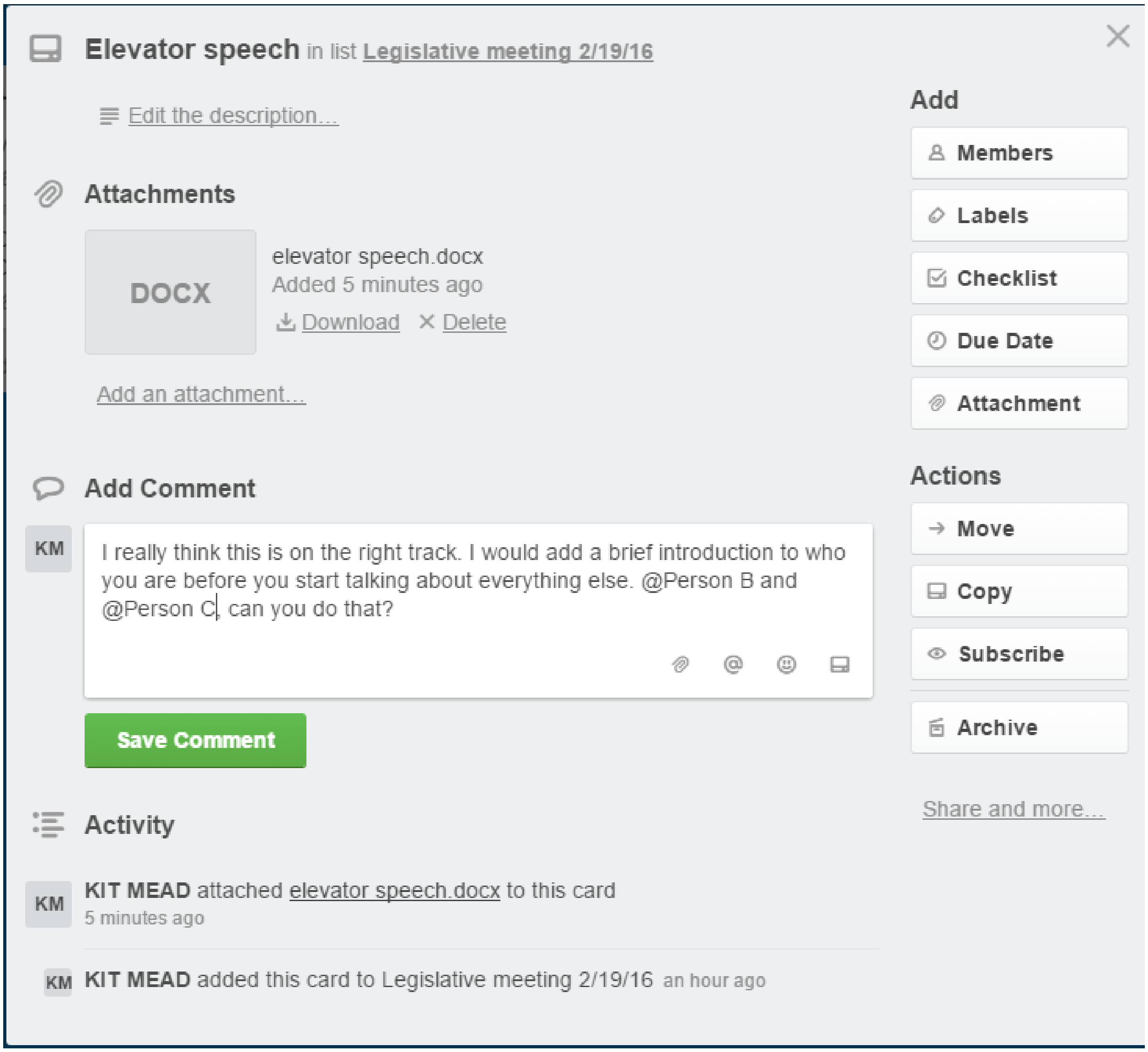


To add a comment, go to the card you want to comment on. Scroll down to the section that says “Add a comment.” Type in your comment, and then click “save comment.”

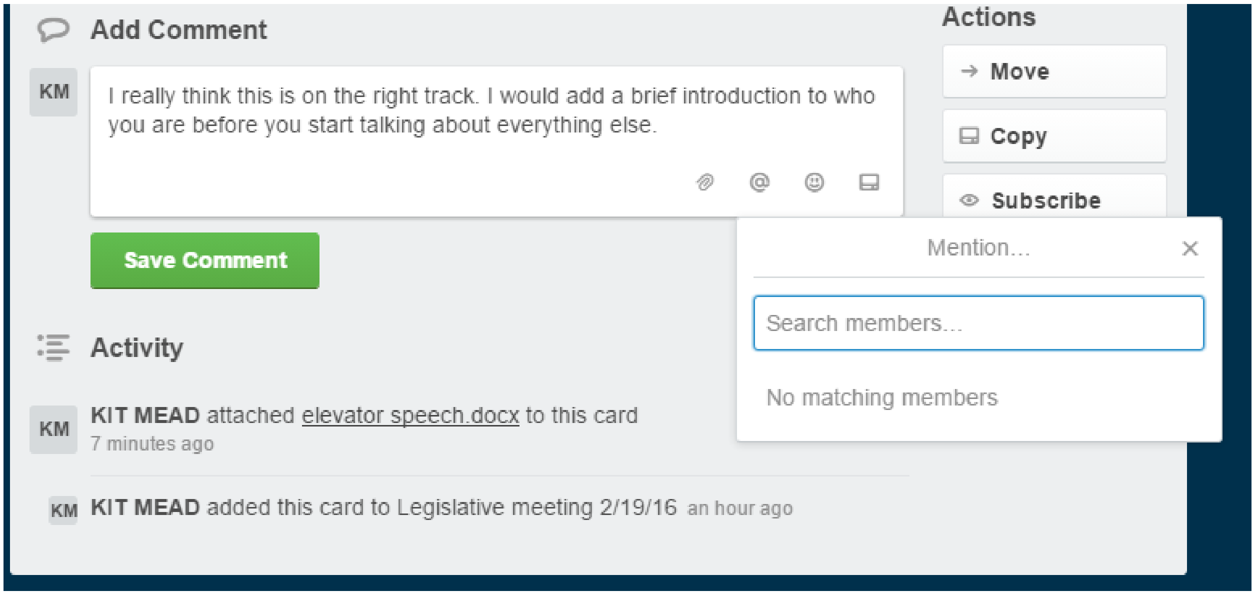


Tagging people

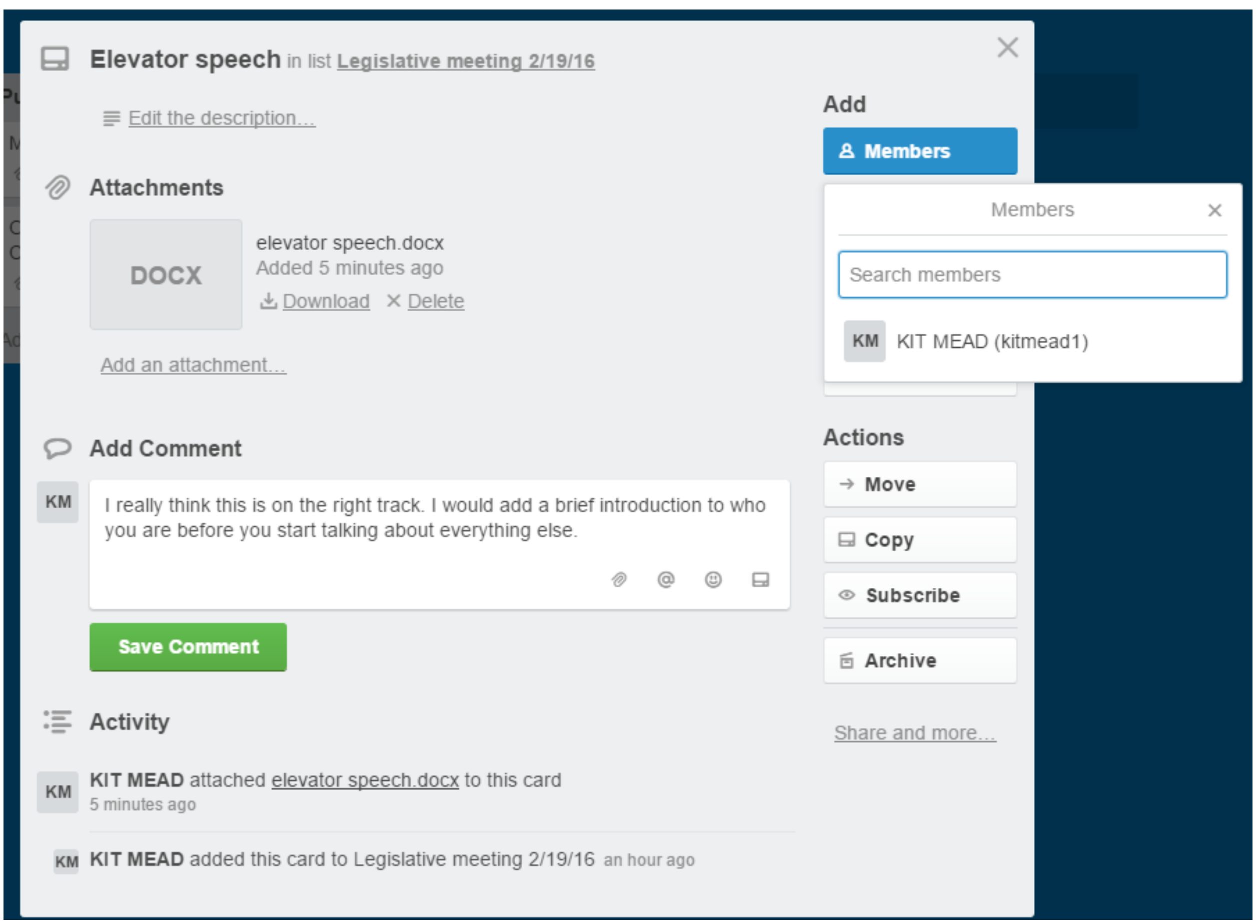
You can also tag people on a card. “Tagging” someone lets them know when you’re mentioning them or talking about something you want them to see. If several people in your group are working on the same topic, you might want to tag them all on the same card. For example, Person A, Person B, and Person C are all working on inclusion. Person A tags person B and person C so that they can see everything that gets said on the card.



To tag a person, you can do three different things. One way to tag a person is to click on the card you want them to see, and then add a comment. When you add the comment, you can type the "@" symbol and then their email address. Or, you can click the "@" symbol manually where it is located at the bottom of the comment box.

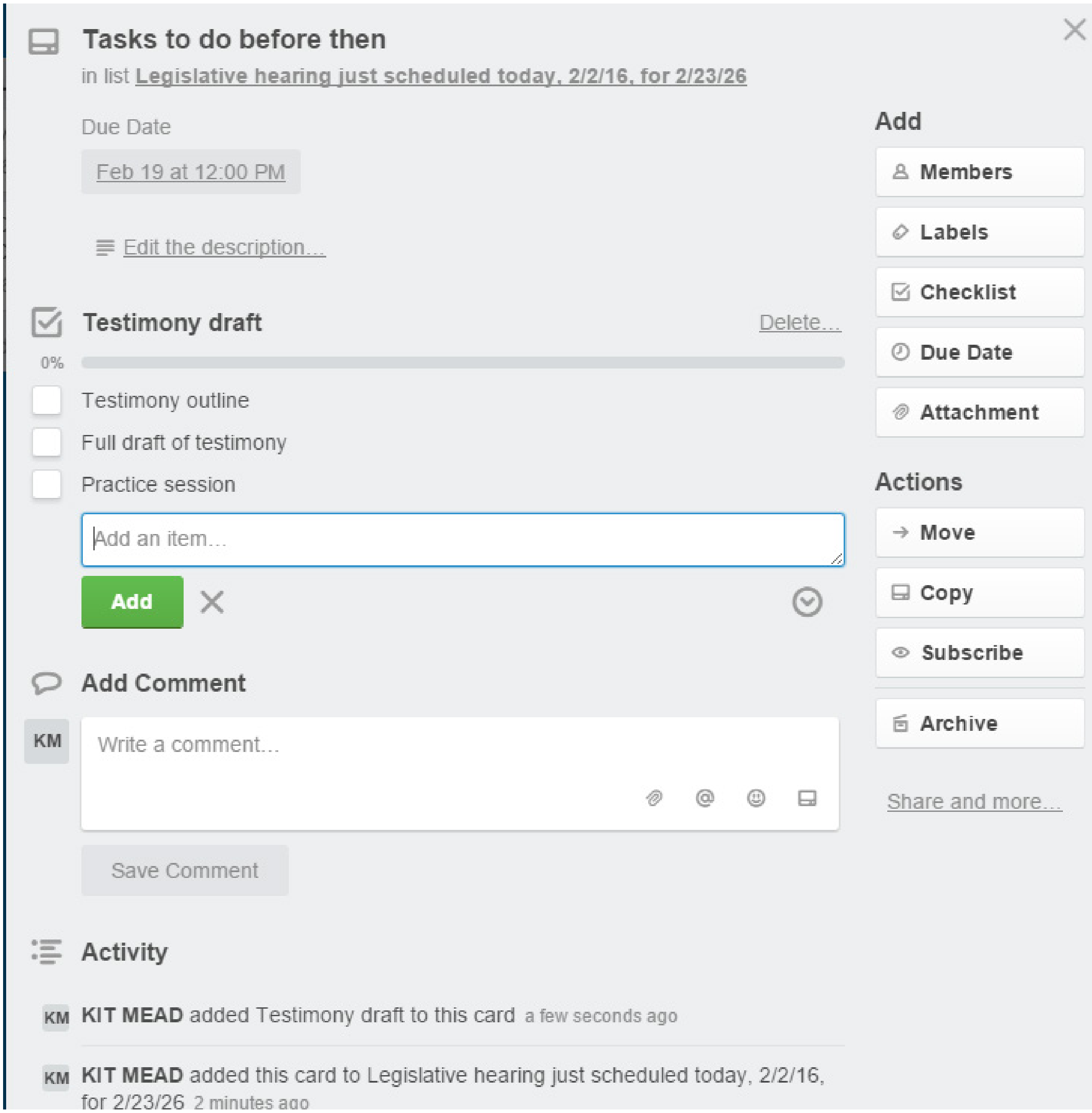


The other way is to click the part of the card that says "members." Start typing in their email address, and add them when they come up.

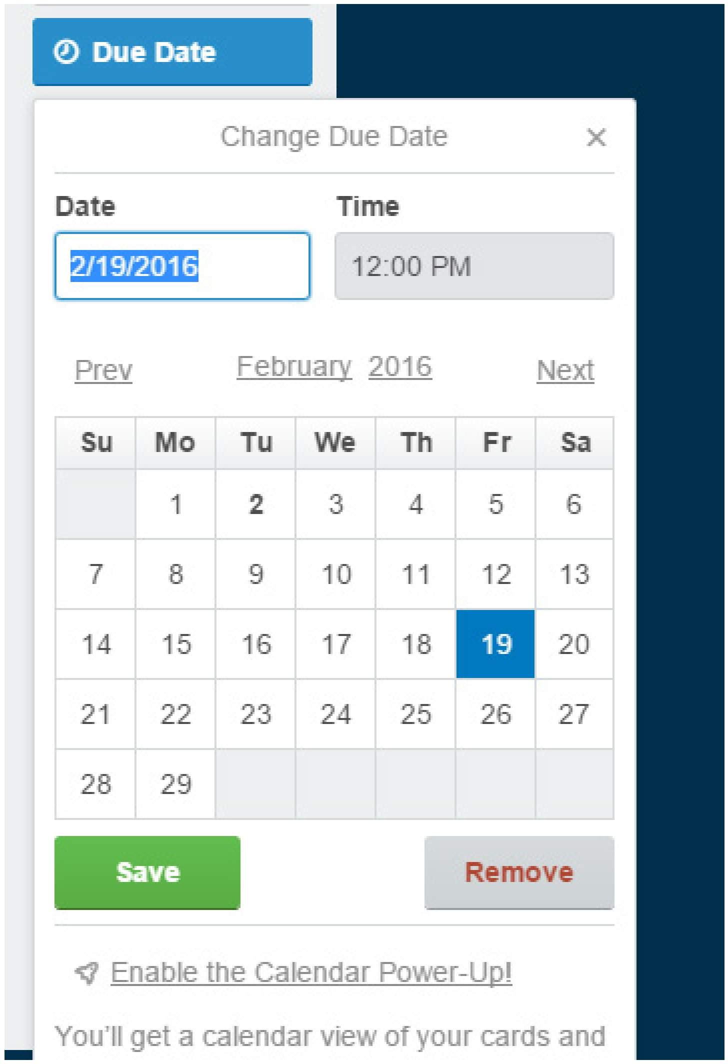


Adding deadlines

You can also give cards deadlines. If a certain step in your project needs to be done by a certain date, you can put that date on the card in order to make sure it gets done in time. For example, if there is a hearing about inclusion in school, yu might need to prepare your groups' testimony by a certain date. You can make the card remind you about when the date is.

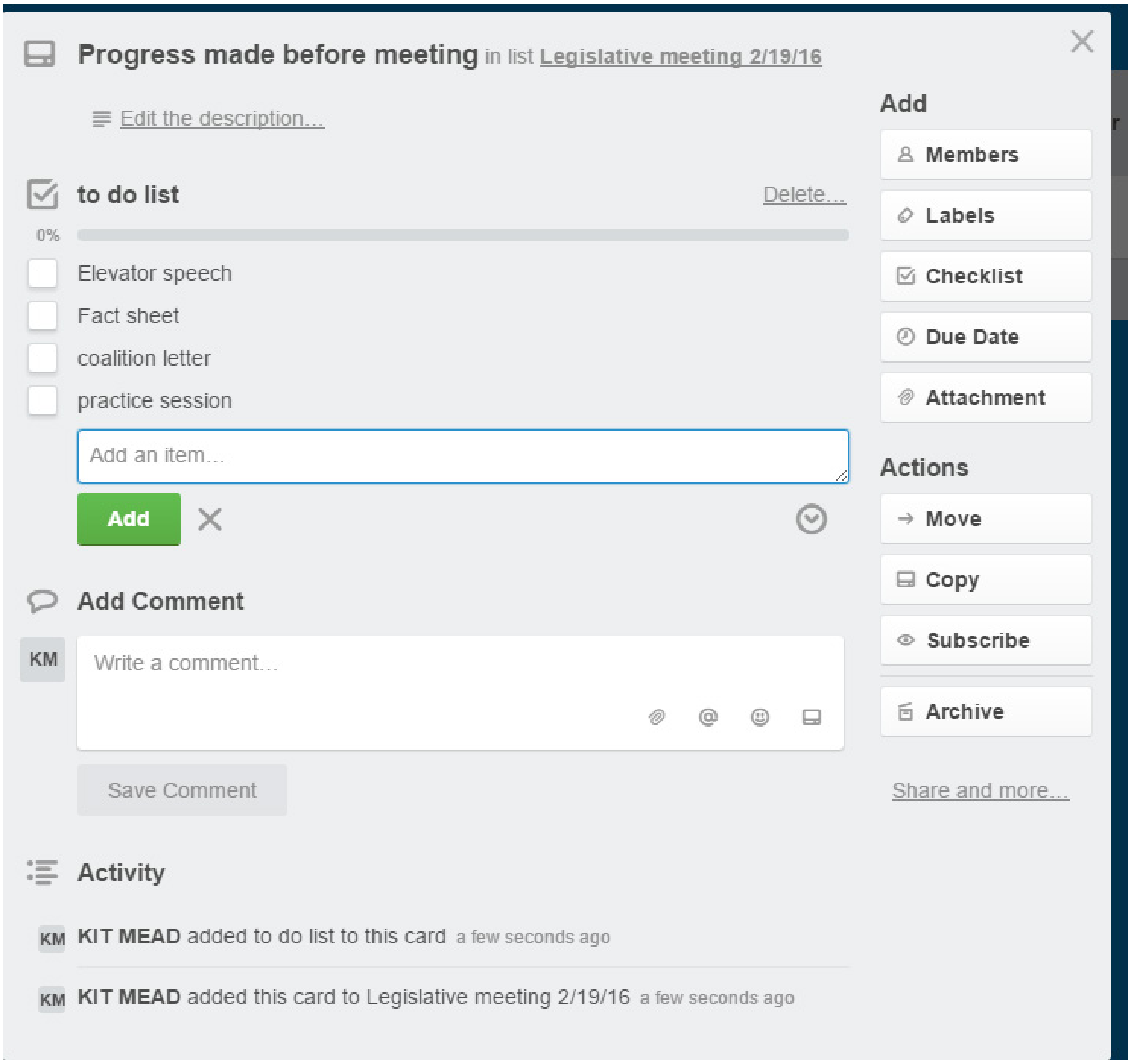


To give a card a deadline, click on the card and then click on “due date.” Click a button and then click “save.”



Adding checklists

The last thing you can do with a card is make a checklist. This is useful if there are a lot of parts of a step or an idea that you need to keep track of. For example, before the Georgia self-advocacy organization can go to their legislative meeting, they need to make sure they are prepared. On the card for the meeting, they can create a checklist of everything they need to do before the meeting. As they do things, they can cross each item off, so they can see what has been done and what still needs to be done.



To add a checklist to your card, click on the card you want and then click “checklist.” First, you will have to give your checklist a title. Then, you will be able to type in each item on the checklist you want. After you type in an item, click “add” to move on to the next one.