Welcome to Group Builder

As we get closer to election day, it’s crucial for volunteers to be able to find local Swing Left groups and get engaged quickly to make an impact in the Super States. Impeachment hearings, the debates, Super Tuesday results, and milestones in the 2020 election calendar are each bringing an influx of volunteers to Swing Left. Group Builder will help you welcome and engage volunteers to build the next blue wave.
Swing Left’s Group Builder provides local groups communication and volunteer management tools to help you recruit new volunteers and engage your existing activists. It works together with MobilizeAmerica and our Grassroots Fundraising Toolbox to offer a set of tools that will help you organize and mobilize the armies of volunteers that we’ll need in 2020 to take back the White House, flip the Senate, and reverse egregious gerrymanders in the Super States.

Wondering which tool you use when you need to get something done? Here’s a simple overview:

<table>
<thead>
<tr>
<th>Tool</th>
<th>Primary use</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Group Builder</strong></td>
<td>Keeping volunteers and group members up-to-date</td>
<td>• Send regular email updates&lt;br&gt;• Let new members know how to get involved&lt;br&gt;• Display all your events in one place&lt;br&gt;• Send out information about upcoming events so members can RSVP</td>
</tr>
<tr>
<td><strong>MobilizeAmerica</strong></td>
<td>Planning and posting events online</td>
<td>• Posts your event to swingleft.org/events&lt;br&gt;• Set up an event RSVP form&lt;br&gt;• Track RSVPs&lt;br&gt;• Communicate with event attendees about logistics after they’ve RSVP’d</td>
</tr>
<tr>
<td><strong>Grassroots Fundraising</strong></td>
<td>Raising money for strategic funds and candidates</td>
<td>• Create a link where donors can contribute toward a Swing Left fund&lt;br&gt;• Set a fundraising goal and track your progress</td>
</tr>
</tbody>
</table>

Looking to post or manage an event? MobilizeAmerica is Swing Left’s event management tool. Group Builder is designed to work with MobilizeAmerica, but it is a separate application from MobilizeAmerica. That said, while MobilizeAmerica is the place where you set up and manage events, we do have background jobs that pull those events from MobilizeAmerica into the Swing Left website and the Swing Left Group Builder. For example, when an admin or core member of a Swing Left Group creates an event on MobilizeAmerica, it will show up on your Group Page for members to see. You can access our Mobilize Guide here to get help managing your events.

If an event shows up on your Group Page, attendees of that event will get automatically added to your group list when they RSVP for the event. We’ll discuss how to make sure events show up on your Group Page in the Promoting Your Events on Your Group Page section.
Setting up a fundraiser? First get started on our [Grassroots Fundraising Toolbox page](https://www.grassrootsfundraisingtoolbox.com) to set up a page where activists can donate. If you are hosting an event for the fundraiser, set up the event on MobilizeAmerica and link your fundraising page in the event description. You can get help with this tool in our [How to Host a Fundraiser Guide](https://www.swingleft.org/how-to-host-a-fundraiser).

**Watch Group Builder in Action**


**Getting Started with Group Builder**

First, if you haven’t created your Swing Left Group Page yet, you can register a group at [swingleft.org/groups](https://www.swingleft.org/groups). Why? It’s one of the best ways for volunteers to find your group online! Volunteers near you who come to the Swing Left website will find your group by searching by their zip code for a group. [The Swing Left Action Finder](https://www.swingleft.org/action-finder) will also recommend nearby groups when volunteers search by their zip code from the Swing Left home page.

**Logging in to the Swing Left website**

Logging in to the Swing Left website is the first step to creating a group page and working with Group Builder. To edit your Group Page or use any of the Group Builder admin tools, you’ll need to be logged into the Swing Left website and also be an admin for your Group. If you don’t have admin access, please ask your Group administrator to change your role (see [Your Participant List](https://www.swingleft.org/participants) or contact your Regional Organizer Coordinator.

You can log in to the website in the footer of every Swing Left page (Under “Preferences”) or at [swingleft.org/user/sign-in](https://www.swingleft.org/user/sign-in). If you are already logged in, you’ll see so in the footer, too.

**Register a Group and Create Your Group Page with Swing Left**

To register a group with Swing Left, follow these simple steps:

1. Click on “Register a Group” at the bottom of [swingleft.org/groups](https://www.swingleft.org/groups)
2. Follow the instructions to fill out the simple form for your Group Page and get access to Group Builder.
CREATE A NEW GROUP

GROUP INFORMATION

Name your Group
Your name will be displayed on the top of your group page. It should be short and descriptive.

Sample Home Town Group

Group URL
The URL will be used to fill out your group on the Swing Left map to help potential members find you. It will also be used to pull location details on to your page.

netleft.org/group/sample-home-town-group

Zip code
This will enable people to filter through zip codes to find groups.

Add a primary photo
This will appear on the top of your page. At least 300px by 300px is recommended.

Mission
This will allow anyone who visits your group name to see the purpose and primary goal of your group.

● GROUP NAME
Once you enter your group name, the form will automatically create a default URL for your page, but you can still customize it at this step. Once you've officially created your group, you can't change the URL or the zip code, so choose carefully.

● ZIP CODE
If your group hosts activities in more than one zip code, choose a zip code that is relatively central to where most of your group activities are. The zip code you choose is relevant for new volunteers who are searching for groups to join on the Swing Left website.

● GROUP LOGO
If you are uploading a logo or image for your group, the required image file dimensions for your logo or image are 350px x 350px square. You can use a free and easy-to-use tool like Canva to convert your logo or image into these dimensions. Our Swing Left branding guidelines can help you design your own logo. This logo will also show up in the header of any emails you send from Group Builder also.

● SUPER STATE
If your group focuses on a particular Super State (if you are in that state or nearby) you have the option to select Super States that will automatically be listed at the bottom of your Group Page.
**PUBLIC/PRIVATE**

At the bottom of the Group Creation page, you can choose whether or not to list your group publicly on the Swing Left website. If you are working on a draft of the page, you can “uncheck” the option to make your group private until you are ready to publish the group. If you don’t list the page publicly, you can still share it with your group members and use Group Builder as described below, but your group will not show up in any searches on the Swing Left website.

**Keeping Your Group Page Up-to-Date**

Your Group Page provides lots of helpful tools and information for both you and your volunteer members. If you already have a Group Page, you can find it by going to [swingleft.org/groups](http://swingleft.org/groups), and you’ll see your group listed under “My Groups” as long as you are logged into the Swing Left website and are an admin for your Group (see [Logging into the Swing Left website](#)).

**Editing your Group Page**

After you create your group, you can click on “Edit Group” at any point in the future to edit your group name, your logo, your mission statement, the “About Your Group” information, the Super States you work in, your social media accounts, and whether your group is public or not. When you are logged in to the Swing Left website, you can also click on “View as Member” to see your page as a member would see it.

Members, who are not admins, see the following when logged into the Swing Left website:

- Group name and logo
- A link to invite others to join the group
- Mission statement
- “About your Group” information
- Super States you work in
- Social media links
- Any fundraising pages that members of your group create

Non-members will see all of the same items, **except** the “About your Group” information.
Promoting Your Events on Your Group Page

Your Group Page is a great way to acquaint volunteers with the events your group and affiliated activists are hosting. You might see events listed under “Local Events” on your Group Page. If a volunteer or group leader has the role of “admin” or “core member” in your Participant list, the events they create on MobilizeAmerica will show up on your Group Page. **For an event to show up on your Group Page, the email address that the event creator uses for setting up events in Mobilize America must be the same email address that is listed on their participant record in Group Builder.**

In addition, when someone RSVPs to an event listed on your Group Page, they’ll be automatically added to your Participant List if they are not already on it. These newly-added volunteers will receive a welcome email.
**Other Resources & Features**

At the bottom of your Group Page, you and your volunteers can start a fundraiser that is associated with your Group Page and see the other resources offered to volunteers on your Group Page. If you’d like to learn more about fundraisers for Swing Left funds, check out our [How to Host a Fundraiser Guide](#)!
Managing Your Group

If you are an admin for your group, you’ll see the admin tools when you are logged into the Swing Left site and go to your Group Page.

Your Group Participant List

Your Participant List includes everyone who has found your group on swingleft.org and joined, as well as anyone that has been uploaded to the list.

To change a participant’s role or delete a member:

1. Click on the pencil icon to the far right of that participant’s record.
2. Choose the role you’d like to update to.
3. Click the check mark.
4. You can delete a member by clicking the trash icon. Be careful—can’t be undone!
Participants privileges vary across role:

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Group Builder Admin Tools</th>
<th>See Group Member Information</th>
<th>Edit Group Information</th>
<th>Events Show Up on the Group Page</th>
<th>See “About Your Group” Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Core</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Basic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

Email Your Members

The Group Builder email tools are intended to make it very easy for Group Leaders to compose and send simple email communications to their Participants List. It is not intended to replace typical email marketing tools (such as Mailchimp, Constant Contact, or Action Network). You can see a feature comparison of typical email marketing tools versus Group Builder email here.

Each admin in Group Builder has their own unique “@swingleftgroup.org” email address in Group Builder. It is listed under “From” when you click into the Email Members feature. Note
that you cannot receive emails at this email address from other email systems (gmail, yahoo, etc), nor can you send emails to individual volunteers from Group Builder with this address. “Email Members” only allows you to send outgoing emails to your entire group list. However, if someone responds to a group email that you’ve sent, you’ll receive that response in the email address associated with your Swing Left website login credentials.

To use “Email Members,” follow these simple steps.

1. Click the “Email Members” button that’s below the Participant List on your group’s page.
2. Write the email as you would in gmail, yahoo, etc. You can use the formatting tools to format your email and personalize the email with the name of your volunteer in the body or subject line of the email.
3. You have several “send” options. You can send a preview email which will go to you and your admins. You can send an email to everyone on your group list, or to only the attendees of a specific event associated with your group. You’ll get a green confirmation message beneath the buttons when your preview message or group message has been sent. Be careful not to navigate away from this page after you send a preview email if you’d like to subsequently send that email to your full group, or you will lose the email text.
4. If you uploaded a logo to your Group Page (see Editing Your Group Page), it will show up as your email header.

**Tips for Emailing Members**

- All emails you send from Group Builder include an “unsubscribe” link. If a member unsubscribes from one of your emails, they will no longer receive your communications. If someone wants to resubscribe to your communications, just ask them to join your group again. If someone asks to be removed from your list, you must delete them from your Participants List.
- Your email must be at least 100 characters.
- If you would like to email only attendees of an event (for example to remind them to bring stamps or thank them for attending), email event attendees through your MobilizeAmerica event. You can learn about emailing event attendees in our MobilizeAmerica guide.

**Customize Your New Member Welcome Email**

Welcome emails are automatically sent to anyone who joins your group on the Swing Left website at: swingleft.org/groups. You can customize your welcome email at any time using the same type of formatting functionality described above for emailing your volunteers.
1. Click the “Customize Welcome Email” button which is below the Participant List.
2. Customize your welcome email using the formatting toolbar. There is a default welcome email provided.

Tips for Customizing Welcome Emails

- If a new member responds to a welcome email, their email will go to our help desk (host@swingleft.org), so you may want to include a general email at which volunteers can reach you in the text of your welcome email.

Getting a List of Your Members: Download CSV (Download all volunteers)

The “Download CSV” button, located below the Participant List, simply downloads a CSV of your full group list, including contact information, immediately to your computer. Similar to Upload CSV, you might use Download CSV to sync your data with another system.

Tips for Downloading Volunteer Lists

- If you are not sure where files download on your computer, check the help instructions for your operating system (Windows or Mac) or for your browser (Chrome, Safari, Firefox, etc.)
**Bulk Adding Members to Your Group Page: Upload CSV**

*(Bulk Upload Volunteers)*

The Upload CSV (Comma-Separated Value file) feature is a great tool for capturing offline signups, or to sync the data between the Swing Left Group Builder tools and any non-Swing Left tools, such as Mail Chimp, Action Network, and spreadsheets of volunteers. Be aware though that when you upload someone to Group Builder, they will receive an email from Swing Left asking them to set up a password for the Swing Left website.

If you are migrating to Group Builder from another tool and moving a list of existing volunteers into the Participant List for the first time, check out the [Transitioning to Group Builder](#) section at the end of this document.

**Most importantly, do not upload contact information for people who have not been involved with your group or associated events** (ex. lists of people you find on the internet, other groups member lists who have not consented to be part of Swing Left, etc.). Uploading lists of people from the Internet, who have not given you explicit permission to receive email from you, can have a **severe** impact on the deliverability of all the email that Swing Left sends and will increase the likelihood that emails that you send from Group Builder will go to spam.
Here’s how to upload a CSV of members to your Participant List:

1. Click on the Upload CSV button from below your Participant List.
2. Format a CSV of the members you’d like to upload by labeling the columns in the first row and filling in volunteer contact information below. You must include at least email and zip code for each volunteer. You can optionally include First and Last Name, and Phone.
3. Click on “Choose File” to upload the CSV from your computer.
4. Match the columns in your CSV with the associated fields in Group Builder using the picklists. The fields might be in a different order in your spreadsheet than they are in the picklists.
5. Click submit.
6. You’ll receive an email from team@swingleft.org with the subject “Group Upload Finished” confirming the results of your upload after it is complete (this can take up to 30 minutes).
7. A newly uploaded member’s role will be “unconfirmed” in the Participant List until that new volunteer logs into the Swing Left website. You can still email these volunteers even if they are unconfirmed.
Tips for Uploading Volunteer Lists

- You can easily create a CSV from any spreadsheet (Microsoft Excel, Google Spreadsheets, etc.). Search the Help section in these software tools for “download as a CSV” or “Save as a CSV” if you need help. Here is a sample spreadsheet you can copy and use to create a CSV if needed.
- Microsoft Excel sometimes "helpfully" trims the leading zeroes off of zip codes when it saves your CSV because it thinks they're supposed to be numbers. For example, it might turn "06101" into "6101". You can solve this problem by formatting the zip code column as text. Keep an eye out for this because it can cause your upload to fail.
- The email confirming your bulk upload may indicate a code after each contact you upload, such as “SUCCESS” AND “ERROR.” If you receive an error code, check to see if the contact who receives an “ERROR” code is already in your group list and/or if there was something wrong with the information you provided in the CSV (i.e. the contact did not have a zip or email address).

Transitioning to Group Builder

We know that teams use a variety of tools to manage their volunteers and communications. When deciding to transition to Group Builder, please review all the functionality above and determine what fits your needs. If it does not, we'd love to know why to help us improve. You can email team@swingleft.org. Some teams may decide to adopt all of the tools and some teams will adopt only some of the tools. All teams should at minimum set up your Group Page so volunteers can contact you and customize your welcome email.

If you are interested in transitioning all of your communications and volunteer management from other tools to Group Builder, you'll need to first move your existing list of volunteers over to the Group Builder Participant List. Here's some process tips for moving your list of volunteers over to Group Builder:

1. Download and/or format your list of volunteers from your existing tool/system/application in a spreadsheet. Clean the list in this spreadsheet. If you have volunteer contact information with out-of-date emails, no email addresses, misspelled names, etc., it’s best to fix as many of these issues as is feasible in a spreadsheet first.
2. If you think your volunteers might get confused by receiving an email from Swing Left that lets them know that they’ve been added to your group, send your volunteers an email from your existing tool/system/application before uploading your list to Group Builder.
In this email, you can explain that you are migrating to a new system and need to add their contact information to Swing Left’s Group Builder in order to send email updates and manage your group list.

3. Bulk upload the members using the Upload CSV feature.

**Getting Group Builder Ready for 2020**

If you haven’t updated your Group Page in awhile, we recommend you take the following steps now and every few months:

- Update your Group Page, including the Mission Statement and “About your Group” section. List a team email address or other method for contacting your Group Leaders in the “About your Group” section.
- Upload a logo.
- Customize your welcome email.
- Upload members who are not in your Participant List from spreadsheets, etc.
- Make any frequent event hosts “core” members.
- Ensure you have new events displayed on your Group Page.

**Resources**

- Swing Left Groups
- Group Builder Training Video
- Online Group Builder Guide
- MobilizeAmerica Guide
- Grassroots Fundraising Toolbox
- Sample CSV Template for Uploading