



# Group Builder Guide

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## 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:

<b>Group Builder</b>	<b>MobilizeAmerica</b>	<b>Grassroots Fundraising</b>
<a href="http://swingleft.org/groups">swingleft.org/groups</a>	<a href="http://mobilize.us/dashboard/swingleft/events">mobilize.us/dashboard/swingleft/events</a>	<a href="http://swingleft.org/fundraise">swingleft.org/fundraise</a>
<b>Primary use:</b>	<b>Primary use:</b>	<b>Primary use:</b>
<ul style="list-style-type: none"> <li>• Keeping volunteers and group members up-to-date</li> </ul>	<ul style="list-style-type: none"> <li>• Planning and posting events online</li> </ul>	<ul style="list-style-type: none"> <li>• Raising money for strategic funds and candidates</li> </ul>
<b>Benefits:</b>	<b>Benefits:</b>	<b>Benefits:</b>
<ul style="list-style-type: none"> <li>• Send regular email updates</li> <li>• Let new members know how to get involved</li> <li>• Display all your events in one place</li> <li>• Send out information about upcoming events so members can RSVP</li> </ul>	<ul style="list-style-type: none"> <li>• Posts your event to <a href="http://swingleft.org/events">swingleft.org/events</a></li> <li>• Set up an event RSVP form</li> <li>• Track RSVPs</li> <li>• Communicate with event attendees about logistics after they’ve RSVP’d</li> </ul>	<ul style="list-style-type: none"> <li>• Create a link where donors can contribute toward a Swing Left fund</li> <li>• Set a fundraising goal and track your progress</li> </ul>

**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](#) 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](#).

## Watch Group Builder in Action

Want to see a live demonstration of Group Builder in action? [Watch our Group Builder Training and Orientation](#) from February 2020.

# 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](#). 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](#) 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](#)) 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](#). 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](#)
2. Follow the instructions to fill out the simple form for your Group Page and get access to Group Builder.

**SwingLeft** Take Action Now Get the Facts Get to Work **Donate**

## CREATE A NEW GROUP

### GROUP INFORMATION

**Name your Group**  
This name will be displayed at the top of your group page. It should be short and descriptive.

**Group URL**  
swingleft.org/group/

**Zip code**  
The zip code will be used to place your group on the Swing Left map to help potential members find you. It will also be used to pull local events on to your page.

**Add a primary photo**  
This will appear at the top of your page. At least 350px by 350px wide is recommended.

+ CLICK OR DRAG A PHOTO  
 HERE TO UPLOAD

**Mission**  
This is visible to anyone who searches for your group. What is the purpose and primary goal(s) of this 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.

The screenshot shows a group page for 'SAMPLE HOME TOWN GROUP' on the SwingLeft platform. The page has a dark blue header with the SwingLeft logo and navigation links: 'Take Action Now', 'Get the Facts', 'Get to Work', and 'Donate'. Below the header, there is a circular profile picture of the group, the group name 'SAMPLE HOME TOWN GROUP', and location information: 'San Francisco, CA 94107 / Administrator'. There are also social media links for Facebook, Twitter, and Instagram. The main content area is white and contains three sections: 'MISSION', 'LOCAL EVENTS', and 'ABOUT SAMPLE HOME TOWN GROUP'. The 'MISSION' section states the group's goal is to flip all of the houses in 2020 and flip the Senate. The 'LOCAL EVENTS' section indicates there are no upcoming events. The 'ABOUT' section provides details about the group's activities and a list of three steps for getting involved.

## 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.

## LOCAL EVENTS

### Swing Left Phone Bank

Sunday, March 29, 2:00 PM

CA DEM Headquarters, 1922 Webster St, Oakland, CA, 94612

### Preservation Park GOTV Letter Writing Party!

Sunday, March 29, 3:00 PM

Preservation Park - Downtown Oakland, This event's address is private. Sign up for more details, Oakland, CA, 94612

### Swing Left April 4 Letter Writing Party in



## 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!](#)

### ABOUT SAMPLE HOME TOWN GROUP

Home Town Group meets monthly to write letters to Super States and plans various other activities throughout the year. We also travel once a month to Super States to knock on doors. We send a bi-weekly newsletter to keep you up to date. Here's how to get involved:

1. Sign up for one of our events above.
2. Contact us at [hometowngroup@gmail.com](mailto:hometowngroup@gmail.com) if you'd like to host your own letter writing event.
3. Share our group with your friends and neighbors. Everyone needs to be involved if we want to win: <https://swingleft.org/group/sample-home-town-group>

### RESOURCES

#### Guides & Toolkits

[Arizona Super State Strategy](#): Learn about our targets in Arizona and what's at stake

[Colorado Super State Strategy](#): Learn about our targets in Colorado and what's at stake

### CURRENT FUNDRAISERS

**YES, IT'S REALLY  
2020 AND IT'S  
TIME TO GET TO  
WORK!**

**BECOME A  
GRASSROOTS  
FUNDRAISER**

Join other grassroots donors and

# 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.

## PARTICIPANTS

[Find Members](#)

FIRST ▲	LAST	EMAIL	PHONE	JOINED	ROLE	
Colleen	McCarthy	colleen@swingleft.org	(650) 906-9986	12/17/19	admin	 
David	Rose	colleen+5@swingleft.org		02/08/20	basic member	 
Erica	Goldman	erica@swingleft.org	(847) 840-1025	12/17/19	basic member	 
Leslie	Knobe	colleen+11@swingleft.org		02/08/20	unconfirmed	 
Phoebe	Gallo	phoebe@swingleft.org	(978) 766-7009	12/18/19	admin	 
Susan	Labandibar	slabandibar@swingleft.org	(617) 571-3757	12/17/19	core member	 
		colleen+50@swingleft.org		02/08/20	admin	 

[Email Members](#) [Customize Welcome Email](#) [Download csv](#) [Upload csv](#)

## 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

Search for a specific member

**Find Members**

FIRST ▲	LAST	EMAIL	PHONE	JOINED	ROLE
Colleen	McCarthy	colleen@swingleft.org	(650) 906-9986	12/17/19	admin
David	Rose	colleen+5@swingleft.org		02/08/20	core member
Erica	Goldman	erica@swingleft.org	(847) 840-1025	12/17/19	basic member
Leslie	Knope	colleen+11@swingleft.org		02/08/20	unconfirmed
Phoebe	Gallo	phoebe@swingleft.org	(978) 766-7009	12/18/19	admin
Susan	Labandibar	slabandibar@swingleft.org	(617) 571-3757	12/17/19	core member
		colleen+50@swingleft.org		02/08/20	admin

Email Members   Customize Welcome Email   Download csv   Upload csv

Participants privileges vary across role:

Role	Access Group Builder Admin Tools	See Group Member Information	Edit Group Page	Events Show Up on the Group Page	See “About Your Group” Information
Admin	✓	✓	✓	✓	✓
Core		✓		✓	✓
Basic					✓

### 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

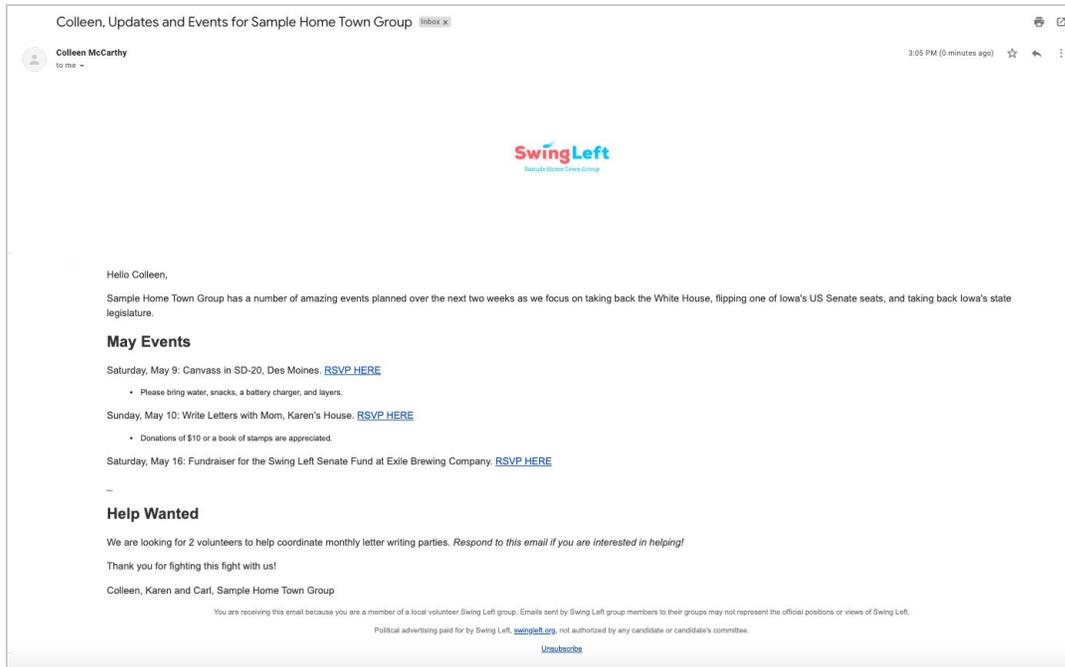
that you cannot receive emails at this email address from other email systems (gmail, yahoo, etc), nor can you send emails to individual volunteers from Group Builder with this address. “Email Members” only allows you to send outgoing emails to your entire group list. However, if someone responds to 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.

The screenshot shows a web-based email composition interface. At the top, it displays the sender information: "FROM Colleen McCarthy <colleen-mccarthy-3742@swingleftgroup.org> (why swingleftgroup.org)". Below this is a "SUBJECT" field containing the placeholder text "%(MEMBER\_NAME)%, Updates and Events for Sample Home Town Group". A rich text editor toolbar is visible, followed by the email body content. The body starts with a greeting "Hello %(MEMBER\_NAME)%," and a paragraph about upcoming events. It then features a section titled "MAY EVENTS" with three entries: "Saturday, May 9: Canvass in SD-20, Des Moines. [RSVP HERE](#)", "Sunday, May 10: Write Letters with Mom, Karen's House. [RSVP HERE](#)", and "Saturday, May 16: Fundraiser for the Swing Left Senate Fund at Exile Brewing Company. [RSVP HERE](#)". Below this is a "HELP WANTED" section with a request for volunteers. At the bottom, there are four buttons: "Send Preview", "Send To Group", "Send To Attendees of:" (with a dropdown menu), and "Cancel".

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](https://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.

The screenshot shows the Swing Left website header with navigation links: "Take Action Now", "Get the Facts", "Get to Work", and "Donate". Below the header is a dark blue banner for the "SAMPLE HOME TOWN GROUP" located in "San Francisco, CA 94107".

The main content area displays an email preview with the following details:

- FROM:** Swing Left <host@swingleft.org>
- SUBJECT:** Thank you for joining the Swing Left Group Sample Home Town Group

Below the subject is a rich text editor toolbar with options for H1, H2, Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, and Source Code. The email body text is as follows:

Hi `%(MEMBER_NAME)%`,  
 Thank you for joining Sample Home Town Group, a local chapter of Swing Left working toward making 2020 an election of huge progressive victories. You can visit the group page at <https://swingleft.org/group/sample-home-town-group> to see the latest events and updates from your group leaders.

Want to take action right now? Invite your friends, family and community to join your group by sharing this url via email and social media: <https://swingleft.org/group/sample-home-town-group/join>.

Together, we can build a government that reflects our values, and make history in 2020—if we get started today. We're thrilled to have you as a partner in this fight.

- The Swing Left Organizing Team

At the bottom, there is a "Customize Your Email" section with a note: "When you use `%(MEMBER_NAME)%` in the body of your email, it will be replaced by the member's first name when the email is sent. Note that this placeholder only applies to the body of the email, not the subject. Try sending a preview to yourself first to see how it works."

## 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](mailto: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)

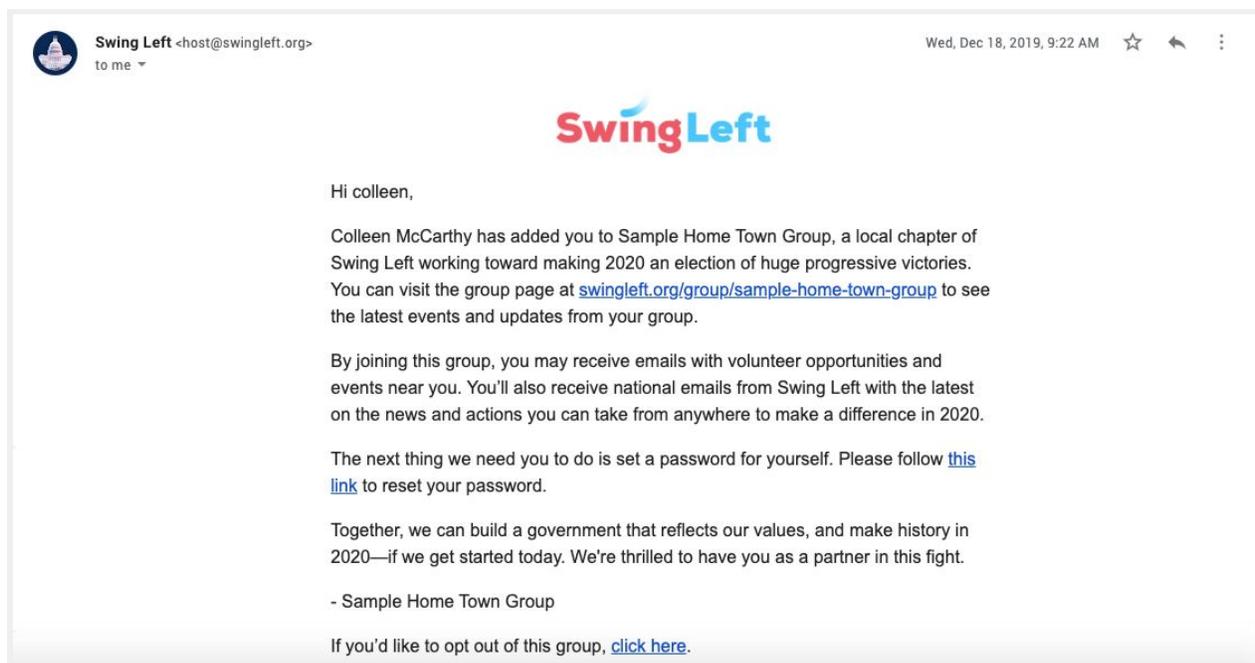
The “Download CSV” button, located below the Participant List, simply downloads a CSV of your full group list, including contact information, immediately to your computer. Similar to Upload CSV, you might use Download CSV to sync your data with another system.

## 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.

**Upload New Group Members**

Use this page to upload new group members in bulk using a spreadsheet.

Choose a CSV file to upload. It must have at least two columns: **Email** and **Zip Code**.  
The additional columns **First Name**, **Last Name**, and **Phone Number** are optional.

Bulk Upload Te... - Sheet1.csv

Match the data fields to your CSV columns:

Email:

First Name

Zip:

Zip Code (Required)

Phone:

✓ N/A  
First Name  
Last Name  
Phone Number  
Email (Required)  
Zip Code (Required)

N/A

## 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](mailto: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](#)