

NATIONBUILDER GUIDE FOR CHAPTER MEMBERSHIP COORDINATORS/NB POINT PERSONS

(With your help, this document will continue to be improved. Please send comments and suggestions to Jody Grage, GPWA Chapter Coordinator at jody@greenpartywashington.org.)

Our database is our most important asset. Because the security of the GPWA NationBuilder database is critical, it is essential that administrative access be limited and closely controlled. Chapter access is limited to one MC/PP and requests for additional access to the database are made to Jody Grage, current NB Coordinator, who also handles changing the chapter MC/PP after approved by the chapter.

Tags in NationBuilder have been determined. Once in the tag field, enter a few letters to generate a drop-down list from which to make your selection. If you hit *return* prior to this action you will generate a new, and unwanted, tag, so be sure the predetermined tag is selected before hitting return. To request a change or an additional to the tag list, contact the NB Coordinator as above.

MC/PP Tasks

Your Staffer permission set will allow you to add or delete contacts, update contact information such as name, address, email, phone number, log contact details, post background or private notes, send eblasts, create and export contact lists, and add or delete appropriate tags for local, county, and volunteer interests.

Primary tasks

- A. Enter new people - both members and non-members (people who come to a meeting or make contact with you in some other way). Do not create new tags but add only existing tags for local chapter and county as well as others as appropriate.
- B. Update records as appropriate - various information fields, deceased, etc.
- C. Combine duplicates.
- D. Delete address when someone moves out of your area, adding new address if available. Delete yourself as MC/PP and send info to the NB Coordinator above.
- E. DO NOT MAKE ANY DATABASE CHANGES FOR PEOPLE OUTSIDE YOUR LOCAL Send the info to the NB Coordinator or the new local if known.

Tidbits

Party - Always NO since denotes party registration which is not done in WA.

Finance Section

The finance section will be accessible for you to view any membership or donation payment information that imports from the GPWA registration and donation pages or is entered by the GPWA Treasurer. However, due to the legal sensitivity of these records, MC/PP agree not to enter, delete, or alter the records in this section. All financial transactions or corrections must be processed through the current GPWA Treasurer or his/her designee.

NB Tutorials

At this time it seems that the best source for NationBuilder tutorials is at https://nationbuilder.com/ht_people. Select the second option on the list - How to manage your people with NationBuilder. The left-hand menu is accessible without getting a free trial or entering information that we are a subscriber. The communication option includes information on eblasts.

E-blasts

It is essential to maintain communicate with everyone in your part of the database because each person has expressed an interest in the Green Party until or unless they ask us to remove them.

Your eblast will go out only to either Supporters OR Prospects, so it is essential to send the same e-blast twice to reach everyone in your part of the database.

While working in NationBuilder and your Local's broadcaster, you agree not to click on any button which would authorize or connect a Twitter or Facebook account. Such actions are not necessary for your work in NationBuilder or when sending e-blasts and can create massive imports of spam and other unusable profiles which compromise the database.

1. Do NOT click on any of the yellow buttons asking you to re-authorize or connect a Facebook or Twitter account. It is not necessary for posting.
2. Do NOT click on the blue-lettered connect Twitter account or Facebook page next to their respective icons.
3. Leave all "import" options UNCHECKED

In addition to the NB tutorials referenced below, Kathryn has written these e-blast instructions for chapter MCPs:

- Sign into Nationbuilder at <https://gpwa.nationbuilder.com/admin/streams/goals>
- Go to communication- click who you want the e-blast to come from in dropdown box.
- Click on "new e-blast".
- Make a short "slug" for the e-mail (short description).
- Make a longer description of the e-blast.
- Click on "clone from previous e-blast" if you want to resend a previous e-blast. to a new group of people or resend e-blast again.
- Otherwise Click on "create & edit a new email blast".
- Click on Supporters (Jody: When finished repeat the process clicking on Prospects so that you send to all the people in the database that you want to reach).
- Don't click on "List" which would go to all supporters in statewide database.
- Click on "tags" to go to specific sub-lists.
- In "tagged with" box, type in "local".
- Choose which local (or locals if you want to include neighboring chapters) you would like to send e-blast to from dropdown.
- Click on "Save & select theme" box.
- Select a "theme". This takes you to a page where you can put in a subject for the e-blast again.
- After "Friend " you can type in your e-blast.
- Don't worry about changing the Primary site URL.
- Click on "Save content" box (shows you the e-blast on the same page) or on the "Save and review" box (shows you the e-blast on a new page).
- If you like it, hit "send now to people" or "schedule" it to send on a certain date or time (bottom left corner).
- If you don't like it arrow back to Content and update and then click on "save and review" as above.

And from Lisa:

Make sure the broadcaster you choose is sending from an email address that you are monitoring. You may receive replies to your e-blast.

You don't need to change the primary site URL at the bottom if you are sending from the Green Party of Washington broadcaster. If you are sending from your

local. broadcaster, please delete this information and change it to match your local chapter name and a link to your website address. You can link to your Facebook page or group if you do not have a website. (Or keep the link to the primary site URL if you want to direct people to the GPWA website.)

Be sure to provide a link to the event if you have one. Adding your name and phone number to the e-blast is also helpful so people can get in touch with you if they need to.

Make sure to send yourself a final draft copy of the e-blast to proofread before sending it to your entire audience.