Action Builder for Mutual Aid

Action Builder is an organizing toolset released in 2019 and built through a close partnership with the AFL CIO by Action Squared, a mission-driven organization committed to building tech for the progressive movement using a [not-for-profit](#), [cooperative](#) model. **We are offering free access** to help coordinate mutual aid and support efforts in your community.

You can use our mobile friendly toolset to:
- Create lists of people who want to help out, and lists of those in need of help.
- Assign helpers specific tasks - including providing them with driving directions for grocery drop off.
- Grow more local leaders. Use our 'assessments' feature to quickly identify leaders and potential leaders; which means better capacity and sustainability for important mutual aid work.

We created Action Builder to track organizing conversations and activities in a way that would work better than scraps of paper or google sheets but would be nearly as intuitive and easy to pick up. [You can read more about it here!](#)

Please note that this version of Action Builder is specific to this mutual aid project. In order to meet the potential demands of the current effort and to make it as accessible to the largest possible audience, we had to limit some of the features in Action Builder. To learn more about the full version of Action Builder to use for other projects and purposes [please check out our weekly webinar here](#).

We recommend using the tool alongside our [Action Network toolset](#) (also free!) to stay in touch with your community through email blasts.

Table of Contents

Important Links:
1. [Join a Webinar](#)
2. [Request Access](#)
3. [Give us Feedback](#)
4. [Share your Stories](#)

How it Works
*Prefer video? Join an upcoming 2x/week webinar.*

Requesting Access

You can [fill out our request form here](#).

We ask for your name and the name of your mutual aid group. After you request access, we create a 'campaign' at the url mutualaid.actionbuilder.org and a login for you. Check your spam for it! You will receive your login within 24 hours (generally much faster).

Adding People

Your mutual aid group starts from zero - you build it from the ground up by clicking 'Add new person' in the menu. Only first name is required and you can add contact information in their profile by clicking their name wherever you see it. Note: you will see potential matches to reduce duplicates in the system.
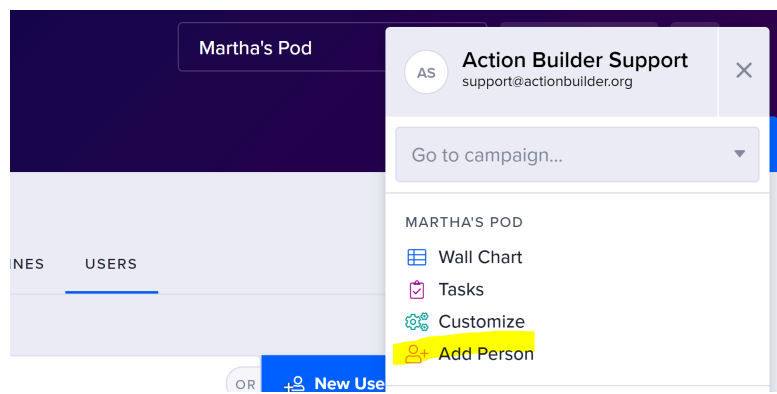
Adding & Searching Information

The 'info' section has been customized by us for this effort. You find this section under the 'info' tab of a person's profile.
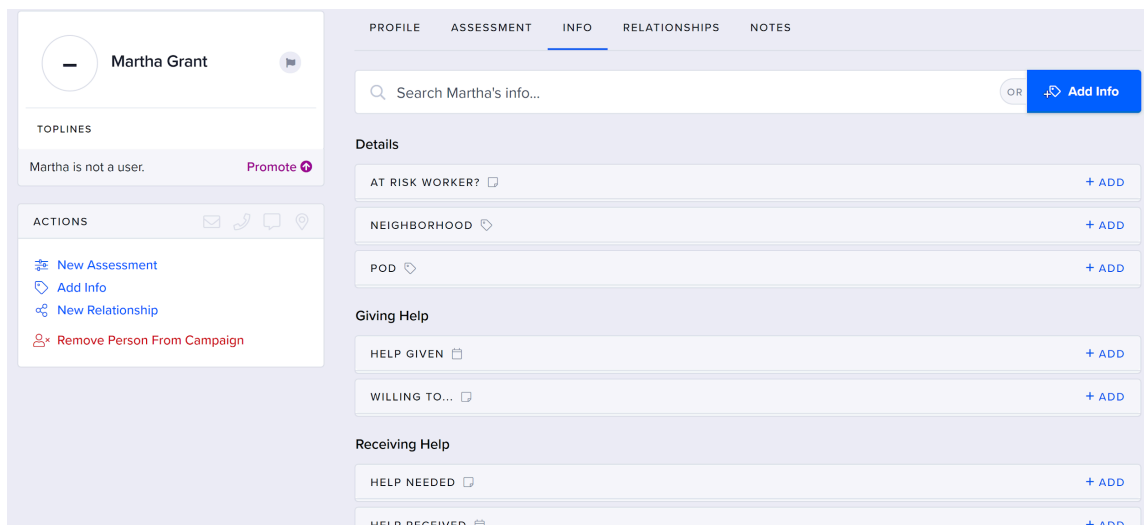
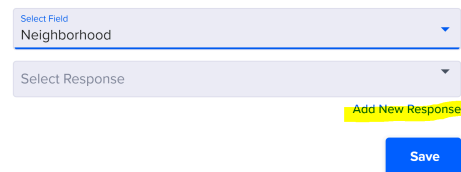Right now we're tracking four core items under the 'info' tab:

- Help Given

What has someone done to help? You can add a date with when they delivered groceries, for example.

● Willing to…
What help is someone willing to provide? You can add notes with more detail.

● Help Needed
What help do they need? You can add notes with more detail.

● Help Received
What help have they received, and when? You can add a date with when they last had groceries delivered, for example.

We also have created a Details section, that right now includes an "At Risk Worker?" question. You can use this to keep track of outreach to workers whose needs may change over the course of the outbreak. We also have included a "Pod" question and a "Neighborhood" question. You can add the names of your pod leaders and neighborhoods here to quickly give folks the right lists. Please use this form if you have suggestions of other questions that should be tracked.
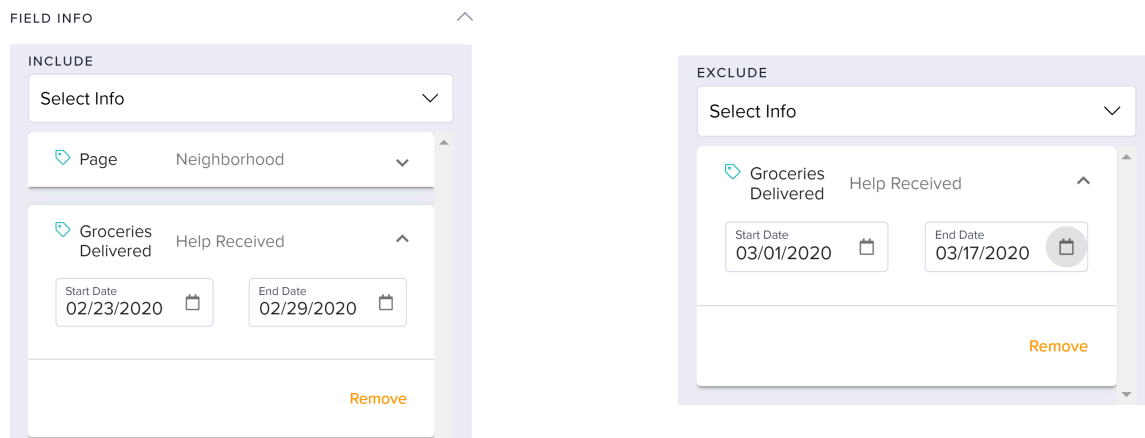.
For any of these questions you can add a new response to the list of options by clicking 'Add New' at the bottom of the field when you click '+Add'. The more responses you add, the more you can search on later on using our filter module.

You access the Filter from the main list, which we call the 'Wallchart'. For example, you might run a search of everyone who had groceries delivered three weeks ago, and none delivered since, but only in a particular neighborhood:

Adding Assessments

The 'Assessments' section lets you add a quick at-a-glance cue of what a person needs and their leadership in your organization.
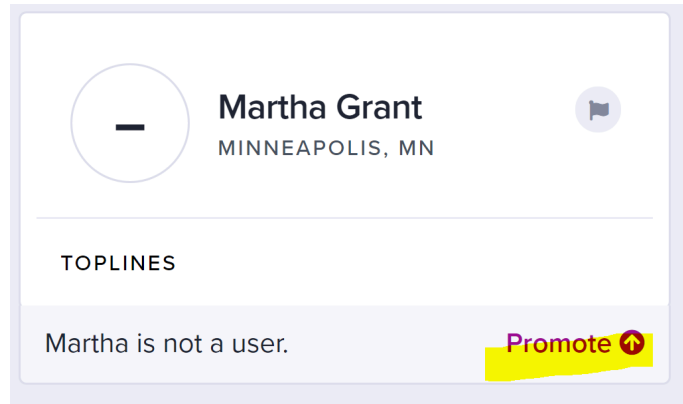

A person will almost certainly bounce between many of these assessments over time. People in need of critical assistance can and will be leaders. What the assessment does is let you see your whole pod at a glance, identify urgent needs, and assess your organizing strategy. Do you have enough people who can provide help to those who need it? Are you successfully encouraging supporters to more actively help out? The best place to check this out is our mobile friendly 'chart view' that lets you group by different fields and see assessments in a bar chart. You get there by clicking the 'bar chart' icon in the top right and then can choose fields or location information to group by clicking 'Choose filter…' under 'Group By'.
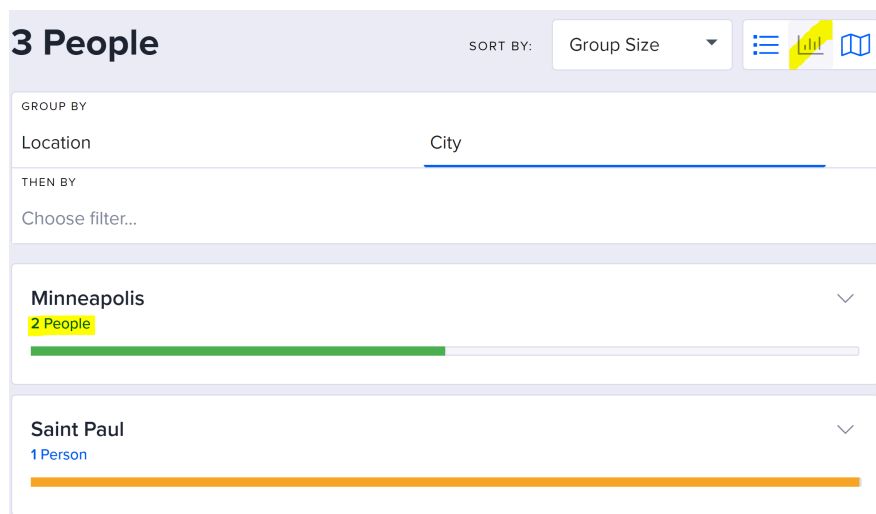
Click on the blue highlighted count (highlighted in yellow above) to see a list of people and click into their profiles.

Adding New Users

Every person in the system can be made a user in a couple clicks, by clicking the 'promote' button.

Martha Grant
MINNEAPOLIS, MN

TOPLINES

Martha is not a user.   Promote ⬆

We recommend you make them an 'organizer' and give them access to the whole campaign by unchecking the restrict access checkbox. You can restrict access to only people in a certain neighborhood or pod, or who need a particular kind of help by clicking the box and selecting the fields. **Please be mindful of who you share personal details with!** We have strict terms of service about treating people well and doing good, but ultimately you are responsible for who has access to the data in your effort.

New User Account

First Name
Martha

Last Name
Grant

Email Address
support@actionbuilder.org

Account Type
Organizer

Access & Assignments

CAMPAIGN ACCESS

Select Campaign
Martha's Pod

ASSIGNMENTS

User does not have any turf assignments

Select Assignments

☐ Limit user's access to this assignment

Then they'll receive an email to set up their login and start helping!

Assigning Tasks

Great! You've created users and they can add information. To coordinate efforts, tasks let you assign specific people specific work to do. You can get to tasks using the menu in the top right. Here is a walk through of how you would create a grocery delivery task:

1. Name the Task and set a Due Date

×

Create Task

Task Name
Grocery Delivery Demo

Due Date
03/17/2020   📅

☐ Enable Quick Check In ⓘ

Create Task

2. Add To Dos (the information you want to track)

Grocery Delivery Demo   ✏️

DESCRIPTION   —   ⊕

DUE DATE   03/17/2020   ✏️

TO-DOS

⚏ **Assessment** (optional)   •••

🗋 **Add Note** (optional)   •••

🏷 **Help Received**   •••

☑ **Add To-Dos**

3. Use 'Targets' to choose who should be part of this action.

Select the people you want to be included in this action.

Targets Count: 0

▽ Create Query

+ Add All People In Campaign

4. For example, you could use the query to select everyone who needed grocery delivery.

FIELD INFO ⌃

INCLUDE

Select Info ⌄

🏷 Grocery Delivery   Help Needed   ⌄

INCLUDE PEOPLE WHO HAVE ⓘ

Must match
any of these responses   ▾

SELECT DATE APPLIED ⓘ

Start Date 📅   End Date 📅

5. Create a 'turf' - you can either cut turf using the map view or use a query based on team leader or neighborhood.

TURFS

📖 Create Turf

6. Assign your turf, who should deliver groceries to these folks?

Turf 1
Turf Not Assigned
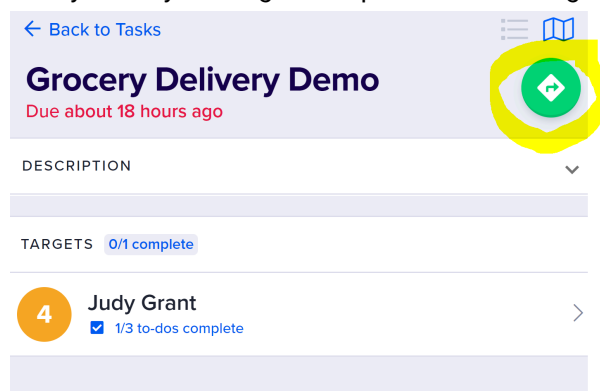
Rename Turf

Assign Turf

ASSIGN TARGETS

The users you assign will see their todos under 'Tasks'.

For grocery delivery, we recommend they copy/paste the notes section under Groceries into their phones notes so they can get the shopping done. This is what that looks like in a person's profile:

Receiving Help

HELP NEEDED   + ADD

Grocery Delivery   Rice, black beans, carrots & onions.   1 day ago
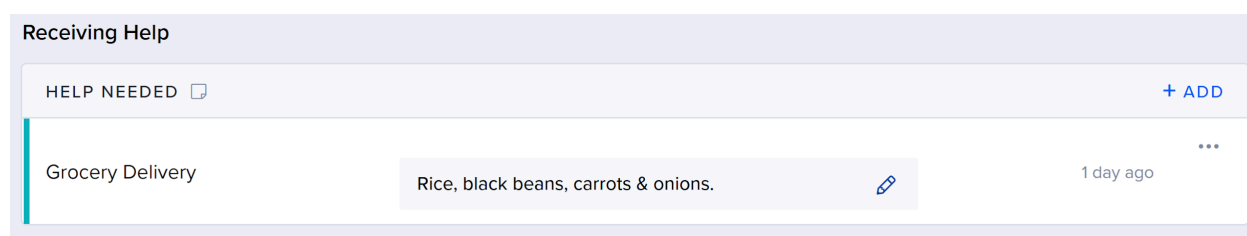
Once they have the groceries, they can get driving directions to each person on their list using the green dot, and mark the grocery delivery date by clicking on the person and adding a date.

← Back to Tasks

Grocery Delivery Demo
Due about 18 hours ago

DESCRIPTION

TARGETS   0/1 complete

4   Judy Grant
         ☑ 1/3 to-dos complete

That's it! <u>Join a webinar for a live presentation and Q&A. We're doing them 2x/week for the next six weeks (at least).</u>

And if you have any stories you'd like us to share about great mutual aid efforts you're doing, or have heard about, <u>please share your stories here</u>.

Evolving FAQ

When will I get my login?
Within 24 hours of signing up! We're working as fast as we can to get these out the door.

I can't find my login

Please check your spam folder! We frequently see these emails going to spam.

We're doing other mutual aid work than is listed here, how can I track it?
You can add new responses under give help, need help, etc., but if you need additional questions reach out using this form: https://actionnetwork.org/forms/action-builder-for-mutual-aid-feedback-form/

Can I upload lists?
No, your access to features is restricted - if we gave you access to uploads you'd have the ability to see and edit everyone else's efforts (eek!). Our quick "Add new person" feature is fast, and the work goes faster the more people you have helping out.