

Contents

Overview	1
Community Organizer Guide	1
Community Setup and Management	1
Moderation and Engagement	1
Shared Resources	1
Cooperative Values	2
Community Management	2
People	2
Communities	2
Partners	2
Invitations	2
Memberships	2
Conversations & Messaging	3
Event Invitations Management (Organizers & Hosts)	3
Permissions & Access	3
Inviting Members vs External Emails	3
Delivery & Throttling	3
Managing Invitations	3
Private Platform Access via Token	3
RSVP Effects	4
Best Practices	4
Troubleshooting	4

% Better Together Community Engine Guide % Auto-generated (community_organizers) % \today

Overview

This PDF bundles the primary Community Engine documentation for community_organizers. Source of truth remains the repository markdown; diagrams should be re-rendered before export.

Community Organizer Guide

This guide helps elected community leaders manage their communities effectively within the cooperative framework.

Community Setup and Management

- Community Management Overview - Creating, configuring, and managing your community

Moderation and Engagement

- Escalation Procedures - When to involve platform organizers
- Roles and Permissions - Authority and responsibilities

Shared Resources

- Democratic Decision-Making - Cooperative governance principles
- Democratic by Design - Design principles for cooperation

Cooperative Values

Community organizers are elected by and accountable to their community members. All decisions should reflect cooperative principles of democratic participation and community self-governance.

Community Management

This section describes how to manage communities, partners, invitations, memberships, and conversations.

People

- **Create & Edit:** Add or modify person profiles, including name, email, profile image, and bio.
- **Search & Filter:** Locate individuals by name, email, community membership, or role.
- **Bulk Actions:** Import, export, or deactivate multiple person records via CSV operations.

Communities

- **Host Community:** Register, customize, and activate new communities with unique branding, privacy, and membership settings.
- **Future Expansions:**
 - **Personal Communities:** Allow individuals to create their own private community spaces.
 - **Geospatial Communities:** Auto-generate communities based on geographic boundaries (regions, cities).
 - **Language Communities:** Segment communities by preferred language/localization.
 - **Nested Sub-Communities:** Enable hierarchical community structures (chapters, subgroups) under a parent community.

Partners

- **Name & Description:** Set partner name, subtitle, and summary description for public listings.
- **Images:** Upload and manage partner logo, cover image, and photo galleries.
- **Contact Details:** Store multiple addresses, phone numbers, email addresses, and social links via the contact detail editor.
- **Mapping & Locations:** Geolocate partners on maps, define service areas, and display interactive location markers.

Invitations

- **Platform Invitations:** Send email invites to new users, assign default roles, and monitor acceptance rates.
- **Guest Access:** Create time-limited guest tokens for one-click entry without account creation.
- **Invitation Lifecycle:** Track invitation statuses (pending, accepted, expired), resend or revoke invites, and view audit logs.

Memberships

- **Role Assignment:** Grant or revoke platform/community roles for individuals, controlling their access and capabilities.
- **Join & Leave:** Manage community membership directly or require approval; bulk-add or remove members as needed.

Conversations & Messaging

- **Conversations:** Create new conversation threads (group or one-on-one), name channels, and add participants.
- **Messages:** Compose and edit rich-text messages (attachments supported) that update in real time via WebSockets.
- **Notifications:** Configure in-app toast and persistent alerts, as well as email digests for unread messages and mentions.

Event Invitations Management (Organizers & Hosts)

This guide covers how organizers and event hosts invite people to events, manage invitation delivery, and track RSVP outcomes.

Permissions & Access

- You must be the event creator, a platform manager, or a host representative for the event to manage invitations.
- Host representative status is determined by the EventPolicy (event_host_member?).

Inviting Members vs External Emails

From the event page's "Invitations" panel:

- Invite Member:
 - Use the "Invite Member" tab to select an existing person.
 - The selector uses available_people to show members not already invited and with an email.
 - Locale defaults from the person if set.
- Invite by Email:
 - Use the "Invite by Email" tab to invite someone via email address.
 - Set a preferred locale for the invitation.

Delivery & Throttling

- Member invitations send a Noticed notification (in-app) and may send an email.
- Email invitations send via EventInvitationsMailer only.
- To prevent spam, repeated sends are throttled if the last send was within 15 minutes.
- You can resend an invitation from the invitations table when appropriate.

Managing Invitations

- View all invitations in the "Invitations" section of the event page.
- Status lifecycle: pending → accepted or declined.
- Duplicate protection prevents inviting the same person/email again while pending/accepted.
- You can delete invitations that are no longer needed.

Private Platform Access via Token

- Invitation links include a token that grants access to the specific event on private platforms.
- Invitees who aren't signed in will be prompted to sign in or register; the token is saved to complete the response after authentication.

RSVP Effects

- Accepting an event invitation automatically:
 - Ensures the invitee is a member of the host community (standard member role).
 - Sets RSVP to “Going” and creates a calendar entry for the invitee.

Best Practices

- Use “Invite Member” when possible (richer delivery + better tracking).
- Stagger resends: avoid sending the same invite within 15 minutes.
- Monitor the “Attendees” section for Going/Interested counts to plan capacity.
- Include clear descriptions and schedule times so RSVP is available.

Troubleshooting

- Duplicate errors: someone was already invited or accepted — review the invitations table first.
- No results in “Select Person”: the person may lack an email address; ask them to add one to their profile.
- Invitee can’t open link on private platform: confirm the token matches the correct event and is not expired.