This worksheet is a tool to help you take a snapshot of your organizing work. The answers you give should help you figure out how to reflect your work in PowerBase. Over time, your answers may change – this can be used as a living document that you update as your organizing work changes and you move towards better data practices.

We chose the language in the questions carefully. Even so, it might not match the language you use in your work. Change it as needed to match the language you use in your organizing work.

For each of these questions, be as *specific* and *detailed* as possible.

Organizing

1. Who do you organize? In other words, who are the different players that matter to the work you do? (ex. the formerly incarcerated, day laborers, volunteers, etc.)

2. What information do you always collect from *all* of these contacts?

☐ First name   ☐ Home phone
☐ Last name   ☐ Preferred method of contact
☐ Home address   ☐ Issue interest
☐ Home email   ☐ Other – explain:
☐ Work email
☐ Cell phone

3. Do you track how your contacts relate to each other and to other organizations? (i.e. contact person for a union or other community organizing group)

4. Do you track the activities your contacts/constituency participate in?

5. How do you determine who your most active constituents/contacts are? If so, what criteria do you use and how do you capture that?

Membership

6. Do you have members?   YES   NO   *If not, skip this section on Membership.*

7. What is a member (officially and unofficially)?

8. Are there different kinds of members/levels of membership? Describe. (ex. Dues-paying at different prices, different levels of participation, etc.)

9. How does a person stop being a member? How does membership end?

10. How do you bring people into membership?

Turnout

11. What steps do you take to turn people out to events?

12. How do you build call lists?

13. How many times do you call people over what period of time for a given event?

14. Who does the calling?

☐ Volunteer team
☐ Organizers
☐ All staff
☐ Other – explain:

15. What is the ideal and what usually happens?

16. How do you identify people you know will come, so you can call them first?

Fundraising

17. What type(s) of fundraising do you do?

- [ ] grassroots
- [ ] individual donor
- [ ] foundation
- [ ] gala events
- [ ] peer to peer
- [ ] sustainers

18. What are your measures to know you're going in the right direction with your fundraising work?

Assessing Leadership & Engagement

19. What criteria are you using to identify leaders? In other words, what activities listed in Question #5 are part of leadership development?

Your Organizational Data Culture

20. How often do you update key contact information of those you've identified as important to your organization's work? (ex. Every time we talk to contacts, once every 6 months, only after events, etc.) Who does this?

21. List *all* the places where contact information could be found.

    ☐ Paper
    ☐ spreadsheet program
    ☐ PowerBase
    ☐ cell phone contacts
    ☐ Outlook/Gmail/individual email account
    ☐ Other – explain:

22. Can everyone in your organization access *all* the data they need easily and quickly?