

## Progressive Technology Project: PowerBase Training

Start	End	Time	Track	Section
9:00 AM	9:20 AM	20	ALL	Opening and Introductions
9:20 AM	9:30 AM	10	ALL	Welcome: Training Overview, Logistics, and Group Agreements
9:30 AM	10:00 AM	30	ALL	Plenary: PowerBase and Long-term Movement Building
10:00 AM	10:15 AM	15	ALL	Intro: Not Just a List of Phone Numbers: Using PB Strategically
10:15 AM	10:45 AM	30	FUN	Entering Canvassing Results
			ADV	Customizing PB For Your Work
			FR	What types of fundraising are you doing? Sharing our experiences
10:45 AM	11:00 AM	15	ALL	Break
11:00 AM	11:45 AM	45	FUN	Entering Canvassing Results (cont)
			ADV	Petitions – Collecting signatures and sending emails
			FR	What types of fundraising are you doing? Sharing our experiences (continued):  Overview of how PowerBase supports different fundraising functions
11:45 AM	12:45 PM	60	FUN	Campaign Components + PowerBase Components
			FR	New Features for Managing your Fundraising progress - the Fundraising Dashboard.
			ADV	Getting your base into PowerBase – Deduping, Importing Contacts & Event Participants
12:45 PM	1:45 PM	60	ALL	Lunch
1:45 PM	1:55 PM	10	ALL	Come back together: How is the day going? Expectations met? Outline of the remaining day
1:55 PM	2:40 PM	45	FUN	Researching your base
			ADV	Getting your base into PowerBase - Webforms vs Profiles
			FR	Planning your Fundraising Campaigns; Using Summary fields to make smart groups to Identify who to ask: donors, organizations contacts
2:40 PM	3:25 PM	45	FUN	Researching your base (cont)
			ADV	The Look and Feel of PowerBase
			FR	Using Contribution Reports to plan
3:25 PM	3:40 PM	15	ALL	Break
3:40 PM	4:10 PM	30	FUN	Organizing your base into groups
			FR	Tweaking your Contribution Pages - best practice
			ADV	Civi Mobile
4:10 PM	4:40 PM	30	FUN	Organizing your base into groups (cont)
			ADV	Civi SMS
			FR	Using Personal Campaign Pages
4:40 PM	5:00 PM	20	ALL	Evaluation and closing for the day

# Progressive Technology Project: PowerBase Training

Start	End	Time	Track	Section
9:00 AM	9:05 AM	5	ALL	<b>Welcome: Day 2 General opening, logistics</b>
9:05 AM	9:15 AM	10	ALL	<b>Review and reflections from the day before</b>
9:15 AM	9:35 AM	20	ALL	<b>How do you know your organizing is working?</b>
9:35 AM	10:05 AM	30	ALL	<b>Organizing Your Base: Deciding Who to Call</b>
10:05 AM	10:20 AM	15	ALL	<b>Break</b>
10:20 AM	11:20 AM	60	FUN	<b>Events and Turnout</b>
			ADV and FR	<b>Phonebanking</b>
11:20 AM	12:20 PM	60	FUN	<b>Communicating with your base</b>
			ADV	<b>Advanced email</b>
			FR	<b>Modifying your PowerBase to Track Donors; Use Profiles to modify search results</b>
12:20 PM	1:20 PM	60	ALL	<b>Lunch</b>
1:20 PM	1:30 PM	10	ALL	<b>Come back together: How is the day going? Expectations met? Outline of the remaining day</b>
1:30 PM	2:05 PM	35	ALL	<b>Building Organizational Trust in Your Data; Creating Best Practices for you Organization</b>
2:05 PM	2:50 PM	45	FUN	<b>Reporting</b>
			FR	<b>Setting up and managing Fundraising Events with online registration</b>
			ADV	<b>Dashboard, Reporting and Searching</b>
2:50 PM	3:05 PM	15	ALL	<b>Break</b>
3:05 PM	3:35 PM	30	FUN	<b>Review</b>
			FR	<b>Managing Grant Proposals and Reporting;</b>
			ADV	<b>Online Organizing</b>
3:35 PM	4:40 PM	65	ALL	<b>Individual/group consultations</b>
4:40 PM	5:00 PM	20	ALL	<b>Online evaluations, plus, minus evals, and Closing</b>