Progressive Technology Project
Powerbase Organizing Training

June 20, 2011

12:00pm – 1:30 Lunch

1:30pm – 2:00pm Check in and Registration

2:00pm – 2:20pm Welcome and Introductions

Objectives: participants will leave with a clearer understanding of:

- What the PowerBase project is and where it is heading
- Numerous features of PowerBase that supports your organizing work
- How to do particular tasks within PowerBase

Facilitator: Josue, Robyn

1. PowerBase – What it is and where it came from
   At one of our trainings a couple of groups challenged us: when talking about databases you give us a litany of the options, we need you to tell us what to use. We decided to take on that challenge and hired Jamie McClelland to evaluate the best open source databases available and chose CiviCRM. Alice Aguilar then recruited 4 organizing groups and started the pilot project for PowerBase. The results of that pilot were turned into CiviEngage, a component of CiviCRM.
2. Participants – Everyone stands and says name, org and previous database
3. Groups – List of all current and coming organizations using PowerBase

2:20pm –2:30pm PowerBase Goals

Facilitator: Arif, Jack, Jamie

1. Organizing – we want to impact the field – Arif
   PTP's mission is to support the technology needs of community organizations.
2. Community – improvements of PB are available to everyone – Jack
3. OpenSource – politics of technology – Jamie

2:30pm –2:45pm PowerBase Organizing Training

Facilitator: Josue

1. Review Agenda – have full printed agenda for everyone and trainer version for trainers
2. Consultations – 7pm and 8pm Monday and Tuesday evening. Other opportunities too.
3. Introduce trainers

2:45pm –2:55pm New Theme

Facilitator: Jack

Show SimplyCivi theme

Get people to try it: My Account → Edit → Choose the new theme → Save

2:55pm –3:20pm CiviCampaign

Facilitator: Josue, Mark

1. Show previous workaround – custom fields
   Create new event and show, in Event Details, the Event Campaign Code field. Create new contribution and show, in Contribution Source, the Code and Method fields. This was our workaround, trying to create a mechanism to connect related events, donations, memberships and activities to each other.
2. New functionality – add a campaign, add an event
   Now you can add a Campaign. Once you do that, when you go to create a new event, you can connect it to a campaign. Same for contributions, memberships, activities AND mailings.
3. Add activity, show new engagement index
   Additionally, when you add the Campaign component, in Activities you have a new core field. The Engagement Index is a mechanism to be able to track how engaged your folks are. For every one-on-one interaction you will be able to decide how "engaged" it makes the person be.
   And just to get this out of the way, I was trained to use a scale of 1 – 5, where the goal was to make everyone a #1. it was a union campaign, so the 5s we never talked to and we were always trying to get people to move up, 4s to 3s, 3s to 2s, etc. If you do it the other way, trying to get everyone to be a 5, good for you. Just translate my numbers for yours.
   We have a search and report for this that will take all the activities done and the scores and return an average, so it does not matter which way you score it. Show report!!!
4. Mention walk and phone lists and surveys – for later
   The Campaign component also introduces surveys, a mechanism for allocating the doing of surveys to volunteers, and new walk and phone lists. We will review that later in the agenda.

2:45pm –3:00pm CiviEvent

Facilitator: Robyn, Jack

1. Show workflow developed during pilot
   Event → Participants → Batch update
   This is the first thing we show when doing a demo of PowerBase. One of the pilot groups was insistent that they need to use the database like they do their work. When they have an event they need to attempt to touch a person three times in order to maximize turn out for the event. The result is a batch update screen with the phone number of the person also available.
   Also show where the phone number is set: Search Settings inside Global Settings

3:00pm – 3:15pm Profiles

Facilitators: Josue, Jamie

1. Batch updates – we just saw one. We can do this with all sorts of data
   Find Contributions → choose 3 → Batch Update → choose Update Thank you Profile
2. Data entry – create your own forms to facilitate the capture of data
   Profiles → Preview New Individual Profile. Now add it to your menu. Administer → Customize → Navigation Menu. Click on New Menu Item. Title: Data Entry. Click on the help button. Leave everything else blank. Save. Now add another item, for the form itself.

3. Web forms – point out advanced settings and html form snippet
   Show a profile already created, Email form 2. Preview it and then show the HTML Snippet.
4. Search Results Popup – do a search, hover over icon and show popup

3:15pm – 3:45pm Exercises

Option 1:

1. Create a campaign
2. Create an event
3. Register people for the event
4. Batch update their responses to being called the first time

Option2:

1. Create a web form that collects email address (required) and middle name
2. Make it so that entries get entered into a group automatically

Option 3:

1. After an event – signup sheet has zipcode, email address and phone number
2. Create profile to update this info.
3. Update this info for all those people.

3:45pm – 4:00pm Summary Screen

Facilitators: Josue, Robyn

1. Decisions PTP made as to what you see on this screen
   Custom sets that are designated as "Inline" show up on the summary screen. Those designated as "Tab" will get their own tabs. For the Demographic custom set we decided to do something special: inject those fields here (point to the screen).
2. Options for you – Tab vs Inline
3. Anyone made changes?
4. Primary language fiasco

4:00pm – 4:15pm Break

4:15pm – 4:30pm Contact Info

Facilitators: Jack, Jamie

1. Shared Addresses – Edit an individual record, Address section has checkbox for shared address. Look up someone and choose them. Save.
2. Upload picture – Edit an individual record, add image.
3. Twitter, Facebook – Edit an individual record, add twitter handle, facebook page.
4. Greetings – Email greeting, postal greeting, addressee.
   1. Addressee is for mailing labels – show Global Settings -> Address Settings
   2. Show Addressee settings – Option Lists -> Addressee Formats

3. Email greetings – there is a token called email greeting. You set this in Option Lists -> Email Greeting. See in action by Sending an email
4. Postal Greeting – there is a token called postal greeting. You set this in Option Lists too. See in action by printing a PDF letter

4:30pm – 4:45pm Advanced Search

Facilitators: Josue, Robyn

1. Search Views – pick the columns you want to see in the results
   Show fields available for SearchResults1 Profile. Do a search and then replace the columns. Show where the default view for searches can be set in Global Settings.
2. Display Results As – show Participants vs Contacts vs Related Info
   Look up Organization Contact Type, who have an Employer Relationship that is active. Then change the Results Display type to Related Contacts and choose the Relationship. In this case it is Employee of. Now you have a list of Employees. If you have a profile that shows current employer, you can choose that and see who they work for.

4:45pm – 5:00pm Exercises

Option 1:

1. Pull up a list of all the children of members whose issue interest is Green Jobs.
2. Create a map of those kids.

Option 2:

1. Pull up a list of all people who have made a donation in the last year.
2. No duplicates.
3. Show me staff responsible and phone number for these folks.

Option 3:

1. I want to send a personalize email to all the Executive Directors of any organization that has had someone attend one of our events in the last year.

5:00pm – 5:10pm Tonite and Tomorrow

Facilitators: Josue

1. Evening consultations
2. Tomorrow's agenda

5:15pm – 5:30pm Evaluation

Facilitators: Jack, Robyn

1. Plusses and deltas
2. Written evaluations