

Seattle May 2016

Day Three: Strategic use of PowerBase in your organization

Additional Documentation and resources: <https://network.progressivetech.org/>

Start	Topic
09:00:00 AM	Welcome and Introductions
09:15:00 AM	Review of the day's schedule and logistics
09:30:00 AM	Presentation of your organizations workplan
10:15:00 AM	Break into groups – meet with your co-workers PB staff will visit each group to finalize your workplan
11:00:00 AM	Independent work, PB Staff floats
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01:00:00 PM	Lunch
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02:00:00 PM	Work Flow Presentation (optional)
02:30:00 PM	Independent work, PB Staff floats
04:00:00 PM	Report back: each organization reports on their work
04:45:00 PM	Evaluation
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05:00:00 PM	Done

Participating groups: PLEASE prepare before hand. You are responsible for coming to the training with a work plan of items you would like to achieve during the day.

The following are examples of plans you may bring to this training:

Set up the de-dupe rules that make sense for your organization and designing your de-dupe process;

Create up the perfect Gala work flow, with a registration page, sponsorships and group tables;

Develop up a strategic grassroots fundraising campaign workflow, peer-to-peer campaign, and more;

Identify the right membership strategy for your organization - with multiple levels and the ability to pay dues monthly or annually, in person or on-line;

Re-work your groups / smart groups and establish a new organization-wide policy on bulk email messages;

Prepare for a major volunteer driven phone banking donation sprint.