

# Progressive Technology Project

## Fundamentals Track

---

This course teaches the basics of using PowerBase for organizing by following a realistic organizing work flow: recruiting members for a membership meeting.

Starting with entering canvassing results, through organizing contacts into groups, sending mass email and registering and doing turn out for the membership meeting itself, this course will acquaint you with all the fundamental steps of using PowerBase.

Enclosed please find the course outline and materials that will be used for the Fundamentals track. You may either follow along on screen, or if you prefer, you may print this out prior to coming to the training.

## Course Outline

---

1. Entering Canvassing Results: the basics of logging in and doing simple data entry of contacts from a canvassing results page.
2. Campaign Components: review of the steps taken in a typical organizing campaign
3. PowerBase Components: aligning our organizing steps with the components in the PowerBase database
4. Researching your base: using PowerBase's various search interfaces to find the data you need in your database
5. Organizing your base in to groups: Using smart groups to organize your base based on various criteria, including which organizer they are assigned to, geography, interest, etc.
6. Events: introduction to creating events and using them to track attendance
7. Event Turnout Workflow: use PowerBase to manage your first, second, and third outreach calls, keep track of who and how people respond, and report on attendances in relationship to outreach calls.
8. Reports: Get a quick birds-eye view of who your yes's are and who needs more contact.

## Walk List: Youngstown

<i>Name</i>	<i>Address</i>	<i>Phone</i>	<i>Email</i>	<i>Notes</i>
1. Elois Birkholz	123 Melbourne Ave, Youngstown, OH 44512	123-555-1234	<a href="mailto:elois.birkholz@example.org">elois.birkholz@example.org</a>	
2. Gail McAfee	145 Melbourne Ave, Youngstown, OH 44512	123-555-3232	<a href="mailto:gail.mcafee@example.org">gail.mcafee@example.org</a>	
3. Janice Pearsall	231 Melbourne Ave, Youngstown, OH 44512	123-555-9322	<a href="mailto:janice.pearsall@example.org">janice.pearsall@example.org</a>	
4. Cecilia Penning	234 Melbourne Ave, Youngstown, OH 44512	123-555-2342	<a href="mailto:cecilia.penning@example.org">cecilia.penning@example.org</a>	Sisiter of Emelia
5. Teodora Kinley	239 Melbourne Ave, Youngstown, OH 44512	123-555-2323	<a href="mailto:teodora.kinley@example.org">teodora.kinley@example.org</a>	
6. Emelia Edelson	244 Melbourne Ave, Youngstown, OH 44512	123-555-3433	<a href="mailto:emelia.edelson@example.org">emelia.edelson@example.org</a>	
7. Marge Light	256 Melbourne Ave, Youngstown, OH 44512	123-555-3221	<a href="mailto:marge.light@example.org">marge.light@example.org</a>	Works nights, Call days
8. Mitchel Bunnell	100 Aylesboro Ave, Youngstown, OH 44512	123-555-2342	<a href="mailto:mitchel.bunnell@example.org">mitchel.bunnell@example.org</a>	
9. Akiko Ehrhardt	110 Aylesboro Ave, Youngstowng, OH 44512	123-555-2531	<a href="mailto:akiko.ehrhardt@example.org">akiko.ehrhardt@example.org</a>	
10. Lavinia Calvin	134 Aylesboro Ave, Youngstown, OH 44512	123-555-1345	<a href="mailto:lavinia.calvin@example.org">lavinia.calvin@example.org</a>	
11. Faye Grana	200 Aylesboro Ave, Youngstown, OH 44512	123-555-2003	<a href="mailto:faye.grana@example.org">faye.grana@example.org</a>	Lavinia's mother
12. Sanjuana Little	204 Aylesboro Ave, Youngstown, OH 44512	123-555-2045	<a href="mailto:sanjuana.little@example.org">sanjuana.little@example.org</a>	
13. Imelda Cudney	215 Aylesboro Ave, Youngstown, OH 44512	123-555-2153	<a href="mailto:imelda.cudney@example.org">imelda.cudney@example.org</a>	
14. Maryrose Barak	225 Aylesboro Ave, Youngstown, OH 44512	123-555-2256	<a href="mailto:maryrose.barak@example.org">maryrose.barak@example.org</a>	
15. Norbert Matarazzo	245 Aylesboro Ave, Youngstown, OH 44512	123-555-2453	<a href="mailto:norert.matar@example.org">norert.matar@example.org</a>	
16. Glenda Bhatti	275 Aylesboro Ave, Youngstown, OH 44512	123-555-2754	<a href="mailto:glenda.bhatti@example.org">glenda.bhatti@example.org</a>	Potential leader!
17. Rex Grossi	110 Centervale, Youngstown, OH 44512	123-555-1104	<a href="mailto:rex.grossi@example.org">rex.grossi@example.org</a>	
18. Yun Ritts	145 Centervale, Youngstown, OH 44512	123-555-1454	<a href="mailto:yun.ritts@example.org">yun.ritts@example.org</a>	Journalist
19. Sheldon Baldon	160 Centervale, Youngstown, OH 44512	123-555-1604	<a href="mailto:sheldon.baldon@example.org">sheldon.baldon@example.org</a>	
20. Micah Pasley	175 Centervale, Youngstown, OH 44512	123-555-1754	<a href="mailto:micah.pasley@example.org">micah.pasley@example.org</a>	
21. Jose Anderson	12 Ewing Rd, Youngstown, OH 445132	123-555-1220	<a href="mailto:jose.anderson@example.org">jose.anderson@example.org</a>	
22. Stephen White	15 Ewing Rd, Youngstown, OH 44512	123-555-1532	<a href="mailto:stephen.white@example.org">stephen.white@example.org</a>	Does not want email

## Walk List: Youngstown

<i>Name</i>	<i>Address</i>	<i>Phone</i>	<i>Email</i>	<i>Notes</i>
23. Christina Richardson	21 Ewing Rd, Youngstown, OH 44512	123-555-2130	c.richardson@example.org	
24. Kathy Murphy	32 Ewing Rd, Youngstown, OH 44512	123-555-2321	k.murphy@example.org	
25. Clarence Hall	120 Ewing Rd, Youngstown, OH 44512	123-555-1200	<a href="mailto:c.hall@example.org">c.hall@example.org</a>	Works for city
26. Jennifer Bell	230 Ewing Rd, Youngstown, OH 44512	123-555-3434	j.bell@example.org	
27. Joseph Patterson	1020 Brookfield Ave, Youngstown, OH 44512	123-555-2134	j.patterson@example.org	
28. Evelyn Carter	1231 Brookfield Ave, Youngstown, OH 44512	123-555-1441	<a href="mailto:e.carter@example.org">e.carter@example.org</a>	Theresa's mother
29. Theresa Cooper	2345 Brookfield Ave, Youngstown, OH 44512	123-555-2324	t.cooper@example.org	
30. Rose Kelly	2349 Brookfield Ave, Youngstown, OH 44512	123-555-2134	r.kelly@example.org	
31. Carolyn Gray	2356 Brookfield Ave, Youngstown, OH 44512	123-555-2356	<a href="mailto:c.gray@example.org">c.gray@example.org</a>	No email
32. Michelle Reed	2700 Brookfield Ave, Youngstown, OH 44512	123-555-2794	m.reed@example.org	
33. Cynthia Hughes	2790 Brookfield Ave, Youngstown, OH 44512	123-555-2342	c.hughes@example.org	
34. Justin Williams	2795 Brookfield Ave, Youngstown, OH 44512	123-555-2450	<a href="mailto:j.williams@example.org">j.williams@example.org</a>	Bruce's brother
35. Martha James	1234 Market St, Youngstown, OH 44512	123-555-1294	m.james@example.org	
36. Rachel Wright	2345 Market St, Youngstown, OH 44512	123-555-1458	r.wright@example.org	
37. Bruce Wilson	2456 Market St, Youngstown, OH 44512	123-555-0987	b.wilson@example.org	
38. Elizabeth Walker	4566 Market St, Youngstown, OH 44512	123-555-2344	<a href="mailto:e.walker@example.org">e.walker@example.org</a>	Knows all the neighbors
39. David Nelson	4579 Market St, Youngstown, OH 44512	123-555-5552	d.nelson@example.org	
40. Keith Young	4601 Market St., Youngstown, OH 44512	123-555-4659	k.young@example.org	

# Using Search to Find Contacts: Exercise

Report the number of contacts returned for each search.

1. Find all contacts on Melbourne Ave: \_\_\_\_\_
2. Find all contacts in zip code 44512: \_\_\_\_\_
3. Find all contacts with the first name Micah: \_\_\_\_\_
4. Find all Potential Members in Youngstown: \_\_\_\_\_
5. Find all contributions made this year for more than \$100: \_\_\_\_\_
6. Find everyone who attended the April 2012 Rally: \_\_\_\_\_

Extra Credit.

Log into your organization's database and run three searches that return useful information for your work. Be prepared to report on what the searches were and what the results were and why it is useful to you.