Day One: Fundamentals

Powerbase Training

Location: Ginn Parlour, 1233 Preservation Park Way, Oakland, CA 94612
Date: Monday, March 9, 9:00 - 5:00 pm

- Please follow along: https://training.ourpowerbase.net/
- Additional Documentation and resources: https://network.progressivetech.org/

<table>
<thead>
<tr>
<th>Start</th>
<th>Topic</th>
<th>Instructor</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:00 AM</td>
<td>Logistics</td>
<td>Natalie</td>
</tr>
<tr>
<td>09:05 AM</td>
<td>Welcome, Introductions and Ground Rules</td>
<td>Alice</td>
</tr>
<tr>
<td>09:15 AM</td>
<td>Review of the day’s Agenda</td>
<td>Jamie</td>
</tr>
<tr>
<td>09:30 AM</td>
<td>Entering Canvass Results</td>
<td>Jamie</td>
</tr>
<tr>
<td>10:15 AM</td>
<td>Campaign and Powerbase Components</td>
<td>Alice</td>
</tr>
<tr>
<td>11:00 PM</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>11:15 PM</td>
<td>Advanced Searching</td>
<td>Jamie</td>
</tr>
<tr>
<td>12:00 PM</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>01:00 PM</td>
<td>Organizing your base into groups</td>
<td>Jamie</td>
</tr>
<tr>
<td>01:30 PM</td>
<td>Introduction to Events – Demo</td>
<td>Natalie</td>
</tr>
<tr>
<td>01:45 PM</td>
<td>Introduction to Contribution pages – Demo</td>
<td>Jamie</td>
</tr>
<tr>
<td>02:00 PM</td>
<td>Event and contribution page practice session</td>
<td>Natalie</td>
</tr>
<tr>
<td>02:45 PM</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>03:00 PM</td>
<td>Group Picture</td>
<td></td>
</tr>
<tr>
<td>03:15 PM</td>
<td>Political Education: Where does your data live?</td>
<td>Jamie</td>
</tr>
<tr>
<td>03:30 PM</td>
<td>Communicating with your base</td>
<td>Alice</td>
</tr>
<tr>
<td>04:15 PM</td>
<td>Reporting</td>
<td>Jamie</td>
</tr>
<tr>
<td>04:45 PM</td>
<td>Recap and Evaluation</td>
<td>Natalie</td>
</tr>
<tr>
<td>05:00 PM</td>
<td>Done</td>
<td></td>
</tr>
</tbody>
</table>

Training Category:
PowerBase

Brought to you by the Progressive Technology Project. Questions, comments, or concerns? Email us at info@progressivetech.org!

All content licensed under the Creative Commons Attribution-NonCommercial-ShareAlike license
**Fundamentals: Opening**

**Description**

Close your eyes and imagine the world 50 years from now *after we have won our struggles.*

Lots of things are different, but pay close attention to the technology. Go around and say your name, organization, preferred gender pronoun and then describe one technology that you see 50 years from now.

**Training Category:**
PowerBase
Description

Explain that we teach in the context of organizing so today is going to be organized along the lines of a campaign.

Show info graphic.

<table>
<thead>
<tr>
<th>Attachment</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>day-one-summary.pdf</td>
<td>1.01 MB</td>
</tr>
<tr>
<td>day-one-summary.odg</td>
<td>1.13 MB</td>
</tr>
</tbody>
</table>
Fundamentals: Entering Canvass Results

Overview
Entering Canvassing Results covers the basics of logging in and doing simple data entry of contacts from a canvassing results page.

Objectives
The objective of this lesson is to ensure all participants are up-to-speed on the most basic PowerBase task, answer common questions about data entry, and put them in an organizing frame of mind. This lesson gets straight to the chase, allowing the participants to start “doing something” on the database as quickly as possible, with minimal presenting.

Requirements
Comfort using a keyboard, mouse and web browser.

Description
The lesson should take about 45 minutes. All students should be using the training database for this lesson.

Login and Password
Show students training database address, provide them with their user name/password, demonstrate how to login and how to change their password (In User packet on Page 4)

Staff Responsible
Explain that we are all working together, but the Database doesn’t know that yet, so we have to add ourselves to the Staff Group.

Have every one follow along: * Click on your link in the left sidebar under “Recent Items” * Click Groups Tab * Click Add to Group → Staff

Change Name
Update your first and last name

Add Campaign
Create a campaign called “Membership Meeting 2019”. Don’t follow along – just one campaign please!

Adding an individual
Demonstrate how to add a new individual contact. Explain:

- We are entering Individuals now, we will enter organizations later. This distinction is important since it allows us to create relationships between individuals and their employers (for example). More on this topic later.
- You can simply click “Contacts → New Individual” (we won't be using sub- contact types in this training)
- How to know if a field is required
- How to expand or contract field groups
- Demonstrate Entering: First name, last name, email, phone, home address, constituent type, and Staff Responsible.

In user packet on page 9

Checklist
- Added campaign?
- Change passwords
- Add yourself to staff responsible
- Change name
- Enter staff responsible when adding a new contact

Final Exercise
20 minutes: Hand out canvassing sheet that contains 40 made up contacts with email, phone numbers, addresses. Tell the group they have to self-organize between them to ensure that all contacts are added to the database and everyone enters at least three contacts.
Throughout the training, these will be the contacts they are responsible for.

**Training Category:**
PowerBase

**Trainee Handouts:**
How to login and reset your password
Sample Canvass Data Entry Sheet
Fundamentals: Campaign Components

Overview
Understand how organizing steps correlate with how data is recorded in the database.

Objectives
The objective of building the components of a campaign is to ensure that everything learned in this track is contextualized in a real-world activity rather than just memorized as rote tasks. We also want to enforce the idea that we want to both record who a person is as well as each interaction we have with them.

Requirements
Participants must have basic familiarity with grassroots political campaigns.

Materials
Setup three pieces of butcher paper in the room. One says "Something about a person" another says "Something a person does" and the third says "Not entered."
Ensure we have post-it notes.

Description
The lesson should take about 60 minutes.

Exercise
Write activities on post it notes
Start by explaining that everything learned in this track will be learned in the context of political organizing. We've already taken the first step: canvassing a neighborhood to find interested contacts.

What other activities do we do when we organize?

Don't restrict to just tech related activities!

Wait until everyone has at least 3 or 4 post it notes.

Explain "something about a person" or "something a person does"

reveal three pieces of butcher paper:
- Something about a person
- Something a person does
- Not entered

Question for group: When we entered the canvassing contacts, did we record "Something about a person" or "Something a person does"? (refer to butcher paper). Answer: what someone is (because we have not yet entered the door knocking activity).

Ask everyone to put their post it notes on one of the three pieces of butcher paper. When finished, pick a few and ask the people who posted them to explain.

Demonstrate
Explain: We are going to review all the ways you can record interactions with contacts, with special focus on groups, relationships and activities.

Ask everyone to follow along on the screen, not on their own computer.

Do not review main menu items!

Pull up a single contact by entering last name, first name in quick search. Review each tab. Explain: some tabs describe what someone is, most tabs show what they have done. Go into detail with:
- Relationships: explain concept, demonstrate adding one
- Activity: demonstrate adding a door knocking activity
- Explain concept of static group. Demonstrate adding a new group (via Contacts → Add Group). But don't search for contacts to add, just add the group, then return to your contact and add the contact to the group via the Groups tab.
- Explain difference between groups and tags and why we favor groups

**Checklist**

- Demonstrate relationships
- Demonstrate door knocking activity (ensure it is completed and set to campaign)
- Demonstrate (static) groups

**Final Exercise**

Ask everyone to find their contacts (one by one via the quick search) and add a new activity for door knocking.

**Trainee Handouts:**

Adding an activity to a contact
Fundamentals: Searching

Overview
Advanced search will cover the basics of finding contacts in your database and understanding how to use actions.

Objectives
Provide users with the ability to find contacts they have recently entered, and to get an overview of the many other ways to search.

Requirements
Experience entering contacts so they can search for specific people to retrieve.

Description
This lesson takes approximately 60 minutes.

Overview of searching. Explain:
There are many different and overlapping ways to search in CiviCRM, each with a different level of precision and complexity.

We will cover the following:

- Quick Search: Demonstrate with:
  - Name/Email: McClelland (explain what happens if you have no matches)
  - Name/Email: fred (explain partial first or last name matches)
  - Email: example.net (explain that everyone has this domain)
  - Actions: Explain that no matter how you search, you always get a set of actions to carry out on the result set.
  - Demonstrate how to select all records, or just a few
  - Demonstrate Print PDFs for contact

- Advanced Search
  - The main interface for searching
  - Explain how to expand/collapse sections
  - Explain that you can use the percent signs.
  - Search on name: fred – demonstrate 4 records returned, then explain how to return to the criteria, and change display results as contributions. Now there are 15 records.
  - Show visual feedback on search terms
  - Demonstrate how to modify search terms: First search for everyone who has contributed more than $100. Woops too many. Then add “Last90 days” and it is less.
  - Explain importance of Reset button

Final Exercise
Find number of contacts returned by each of the exercise searches.

Review answers from exercise, questions and answer.

Training Category:
PowerBase

Trainee Handouts:
 Intro to searching
 Basic search exercise
Fundamentals: Organize your base into groups

Overview
This lesson will teach participants the various ways you use searches to further categorize your base through the use of static and smart groups.

Objectives
- Understand the difference between static and smart groups
- Understand how to remove people from groups and impact on smart group

Requirements
Participants must have a basic familiarity with searching.

Description
This lesson should take approximately 30 minutes.

Do an advanced search by the “Person Responsible” field. Ask everyone to follow along, but choose themselves as the Person responsible.

Under Actions, select New Smart Group and create a smart group for your people. Use the prefix: FUN and explain the naming convention.

Next, do a search for your smart group.

Explain: because it is a smart group, every time a new contact is added with you as the responsible person, it will show up automatically in your group.

Summarize: smart groups are like saved searches. Group naming conventions are critically important!

Final Exercise
Use the smart group you created to find your contacts. We have to make a follow up call to the people you canvassed to invite them to the membership meeting. We have to record the phone conversation as an activity, with notes on how the call went. Find everyone in your smart group. Then, one-by-one, add a new phone call activity. You can make up notes, whether you contacted them, etc.

Extra credit: If you did searches in the last lesson on your organizational database that returned useful information, create smart groups based on it.

Trainee Handouts:
The differences between tag, groups and smart groups
Fundamentals: Events

Overview
Introduction to creating Events.

Objectives
Understand when to track a meeting using activities and when to use CiviEvent, understand the meaning of the most common CiviEvent options.

Requirements
Basic familiarity with searching.

Description
30 minutes

Explain
Activity vs Event (5 minutes)
There is a super easy way to track that someone went to a meeting: create an activity of the type Meeting with the date of that meeting. Super!!
If you only want to track that someone was at an event, using an activity is the way to go – far simpler.
You only need to use Events if you require: * Handle online and offline registration * Track who actually came to the event * Limit to a given capacity and have a wait list * Have a public web page with the event details with social media links and a map * Setup and collect fees * Send Reminder Email * Allow people to tell a friend

Demonstrate:

Demonstrate creating Event
Create an Event for a regular membership meeting.

Page 1 (Info and Settings)
- Importance of filling out End date (will mess up searching)
- Public Event: controls whether it is available via the web. It's useful if you are sending outreach emails or twitter posts, etc that advertise the event – you can just add a link to the event and not have to repeat all the data. Make it a public event.

Page 2 (Event Location)
- Choose from existing locations. This info will be displayed on public page and used to create map. For address, enter an address near where people are canvassing:

2400 Wallingford Rd, Winston Salem, NC 27101

Page 3 (Fees)
- Payment processor: Should be setup by your Admin. We don't need a payment processor because the meeting is free.

Page 4 (Online registration)
- Demonstrate choosing from existing profiles.
- Provide brief explanation of what a profile is (a collection of fields to collect data). We will cover profiles in more detail in advanced.

Page 5 (Schedule Reminders)
- Skip – advanced topic

Page 6 (Tell a friend)
- Skip – advanced topic

Page 7 (Personal campaign pages)
- Skip – advanced topic

Demonstrate what you can do:
Final Exercise

No exercise: practice during combined contribution page/event page exercise

Training Category:
PowerBase

Trainee Handouts:
Creating an event
Fundamentals: Contribution Pages

Overview
Introduction to creating contribution pages.

Objectives
Demonstrate basics of how to enable users to make donations to your campaigns.

Requirements
Basic knowledge of how to navigate in Powerbase.

Description
30 minutes
Theme: But wait a minute...
A volunteer hears about the membership meeting. They can't come but want to write a check to support the meeting. Wait a minute! How can we record this check??
Demonstrate offline contribution.
- Lookup contact
- Click Contributions tab
- Click New Contribution
- Explain financial types
But wait a minute! What if he is a normal human being and doesn't carry his checkbook around? How can we accept a credit card donation?
Explain Payment processors
- Show payment processor work flow
- Discuss authorize.net vs stripe. Don't use Pay pal, don't use iATS
- Setup dummy payment processors: include both live and test
- Demonstrate contribution with credit card
But wait a minute! What if we want people to do this over the Internet?
Show existing contribution page
- Go to Manage Contribution page
- Review settings of existing Contribution page, explain how to fill in the intro message and footer
- Skip sections that are not set
- Show link to view live and testing page

Final Exercise
No exercise: practice during combined contribution page/event page exercise

Training Category:
PowerBase
Trainee Handouts:
Creating contribution pages
Fundamentals: Event and Contribution Page Practice Session

Description

Explain that we are going to break into small groups for people who want to practice contribution pages and those who want to practice events.

Remind people of the ground rules, especially: encourage those with more knowledge to teach and let those with less experience do the creating

As for show of hands: * Who wants to practice Contribution Pages? Break into groups of 2 - 3 people * Who wants to practice Events? Break into groups of 2 - 3 people
Fundamentals: Where does your data live?

Description

Where does your web site live?
Ask the group: Where does your web site live?
Drill down on the answers until you get:

1. On a hard drive
2. On a server
3. In a cabinet
4. In a colocation center
5. In a city

Who owns the hard drive? Who can get that data on the hard drive? How?

Where does your powerbase live?
Break it down.

Wrap up
Whether or not you fear for your data, we have a movement-wide problem: in an age where the fastest growing and most dangerous corporations are responsible for running our data centers, how do we challenge their hegemony?
Fundamentals: Communicating with your base

Overview
Introduction to send mass mailings and printing mailing labels.

Objectives
Ensure participants are familiar with the basic steps of sending an email using CiviMail and printing labels using the Print Label Action menu from the search results page.

Requirements
Participants must be familiar with running searches and creating groups.

Description
60 Minutes total

Overview (5 Minutes):
Explain that we are now going to send post cards and email people reminders about the event.

Mailing Labels Demo (10 Minutes)
Printing mailing labels. Ask a volunteer to take us through the steps of finding everyone in our target zip code. Next, select Mailing Labels and then the size.

Using simple mail vs Mosaico
Demonstrate way to send single mail to one or more contacts (via activities or via search).
Explain: limited to just 50 contacts, no click throughs or tracking. Only useful for one offs

Mosaico Mail Demo (25 Minutes)
Go to first page of CiviMail and show how you need a group to send the message to. Ask: What group should we use? Elicit answer: everyone! But – what about people without email addresses?
Go to: Contacts → Manage Groups and show them the existing group: Every person with Email. Demonstrate how that group was created (% is wild card).

First Screen:
Naming conventions: name of mailing and subject line can be different! The name only shows up to PowerBase users. Pick a good name.
Recipients: Include/Exclude: explain. After you have added our first mailing, you will also be able to include/exclude from previous mailings

Editor
Template: Explain difference between default versifix template and any templates we may have created. Avoid the other default templates.
Demonstrate how to add text and add a link.
Value of testing: You must test in many email clients, on phone, etc.

Tracking
Explain all options – and how Click throughs are more reliable than opens.
Advise against Track Replies (replies may get missed). Mailing visibility: If you are sending the agenda to your Board meeting, might want to not make it public.

Schedule
Immediately doesn't mean immediately.

Final Exercise
Everyone must create their own mass mailing to their contacts.
Fundamentals: Reporting

Overview
Provide an overview of PowerBase reports and how you can use them to understand your base.

Objectives
Understand the different between a report and a report template; know when to use a report and when to do a search.

Requirements
Basic familiarity with CiviCRM.

Description
Time: 60 minutes
Explain: Your ED has asked you to report on who attended. They also want to know how many people said yes compared with those attended. They want the report on their desk.
Ask: should we do a search or run a report?

Demonstrate
What's the difference between a search and a report?

Searching:
- Searching is generally intended to show results on a screen, reports are designed to be printed
- Searches return a list of results, reports can optionally be designed to provide totals and other statistics

Searches always have a list of actions you can run on the results, Reports can only have the results added to a group.

Reporting
- Both reports and searches can be saved. Saved Reports are called “Instances” of a report and you can save them as a menu item. Saved searches are called “Smart Groups” and will be available wherever groups are used.
- Reports can be added as “dashlets” to your dashboard.

Turn Out Report.
- Go to Reports → Event Reports
- Go to Event Participant List.

Explain: This report doesn't limit the results – so all events are included. Limit to just our event.
Demonstrate printing the report.
Then: you know that your ED is going to ask for this next week before the board meeting, so save yourself the pain and create a menu item so the ED can access the report whenever they want.
And... For next time, you can create a dashlet that shows up on your dashboard.
That way you can monitor the turn out as you are organizing the event.

One more example
- Go to Reports → Campaign Reports → Database Health Report last 12 months
- Show results. Ask the participants who is the one with the most modifications.

Final Exercise
Using your own database, explore the reports and find one that is particularly useful for your purposes. At the end of the session, we'll ask people to explain which reports they chose.

Training Category:
PowerBase