Progressive Technology Project
Powerbase Organizing Training

June 22, 2011

9:00am – 9:15am Logistics and announcements

9:15am – 9:45am Basebuilding Panel

1. NYCC – Olivia
2. Strategy Center
3. CJJC – Vanessa
4. Questions

9:45am – 10:00am Putting your people to work

Facilitators:

1. Personal Contribution Pages
    1. Review process – Create page, add users, need payment processor
        1. Create contribution page
        2. Test, test and test!
2. Contacts updating their own records – creating the token in a mailing

10:00am – 10:15am Walk and Phone Lists

Facilitators: Alice via skype (!!)
1. Show how it works
2. Present default setup

10:15am – 10:30am Themes

Facilitator:
1. Events, Donations pages that look like your website
2. Different looks for every donation page and every event

10:30am – 12:00 noon Future Development

Facilitator:
1. What do we need
    1. What would groups like
    2. What does PTP want
    3. What are funders interested in
2. What is the process for deciding

12:00pm – 1:00pm Lunch

1:15pm – 2:00pm Final evaluations and closing

Advanced Topics

1. Payment Processors configuration and testing
2. ACL (Access Control List) – segmenting access to your data
3. Permissions – giving PowerBase users different levels of access
4. CiviCase – do you need it for your case management work?
5. Drupal benefits – URL alias, Views
6. Multilingual site
7. Creating a custom report