PowerBase Introducing Scenarios

Overview

The group will be presented with 3 organizing scenarios. They will be split into smaller groups and asked to develop and organizing strategy for their scenario.

Objectives

Our objective is to provide a base level lesson on organizing strategy. In addition, this lesson provides a context for all later exercises. Rather than learning how accomplish tasks in a vacuum, the scenarios provide a real organizing context to consider the pro's and con's of each PowerBase feature.

Requirements

Some experience organizing a strategy. It does not have to be an "organizing" strategy in a strict sense – it can be any strategy, such as a communications plan, plan for collecting back membership dues, or a plan to build out an individual donors program.

Materials

- Hand describing each scenario – all scenarios on one page, so everyone can see everyone else's scenario.
- Butcher paper or white board for instructors to write down key strategies. One section for strategies we will cover, and one section for strategies we won't cover.

Description

The lesson should take about 60 minutes, with 15 minutes of instruction and 25 minutes of small groups, and 20 minutes of report back.

Explain

Explain that we will break into small groups and each group will take on scenario.

Each group should come up with a 5 – 10 bullet point strategy for handling the scenario. Do not going into detail! Just the basic outline of your plan.

Suggest that people pick scenarios closest to their actual work – but that is not a requirement.

Small Group

Instructor should circulate and ensure there is an appropriate amount of detail.

Report Back

Report back one group at a time. For each strategy bullet point, assess whether it is something we will be covering in the training and put in the appropriate place.

We are looking for:

- Assess who are strongest leaders are in a given area
- Contact people matching a certain criteria/segment the database
- Import data from another source
- Collect data via online forms
- Email or do turn out

PowerBase Measuring Engagement

Overview

Measuring engagement challenges participants to think about organizing strategy and how to move people along an engagement ladder. It also provides training on useful tools for measuring this engagement in powerbase.

Objectives

All participants should finish this lesson with a solid grasp of how find the individuals in their database with the most activities, specifically how to use the Engagement Search and Event Count search and also how to find potentially useless contacts (e.g. without addresses, etc).

Requirements

Familiarity with how PowerBase records activities – events, donations, etc.

Materials

- Exercises: Worksheet asking for counts based on Engagement and Event Count searches.

Description

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

Discuss

What are the objective indicators that a person in your campaign is active? Attend meetings? Fill out petitions? Give donations? On board? Encourage people that may not be doing data entry that they can be using information such as messages. Email messages. Or people can consider what they would like to start doing even if they are not collecting data now. Start where they are.

Can you find these people in your database? Are you ever surprised by the results?

Demonstrate

PowerBase Measuring Engagement

Review how all events and contributions show up under activities.

Pick a random contact in the database.

Add a new activity of type meeting and put in an engagement level of 5.

Add three contributions of $5,000 each.

Review: you cannot set an engagement level for events or contributions – only activities added via activities tab directly.

Show summary fields.

Event Count search: Demonstrate a search for everyone who has attended 2 events since January 1 last year. Demonstrate making it a smart group.

Limitations: only events. What if you track other forms of engagement? What if you use the engagement index?

Engagement Search: Demonstrate search for everyone with at least 1 activity that has an engagement level of 4 or above.

Advanced Search Summary fields:

How would you find everyone who made more than $10,000 in donations last year?

Wrong answer: Search for donations of $10,000 or more (doesn’t include multiple donations same year).

Right answer: Summary fields: More than $10,000 total.

Also demonstrate Last Membership Payment:

How would you find everyone who has not made a membership payment since last year?

- Find an existing membership with the payment made last year, then renew it.
- Wrong answer: Search for contributions with financial type "Membership dues" made during the previous calendar year. Demonstrate that it is wrong: it should include the person you just renewed.
- Right answer: Summary fields, last membership payment with Date range previous calendar year. These people have not made a membership payment since December.

Discuss

What about the opposite? Instead of finding people who are fully engaged, what if we find people who are useless to us? Like people without any contact information?

Demonstrate

Search Builder

Find everyone with a empty city, state, zip code, email and phone number.

Teach: Contacts vs Individual, Location Type (choose primary), what different criteria mean, And/Or search

Put in a smart group called: Everyone without contact information

Teach: Naming convention (develop one) and mailing list checkbox (don't check it unless you really want to send them email).

Discuss

What if you want to delete all records without contact info **unless** they have made a contribution?

Include/Exclude

Create a smart group of everyone who made a contribution.

Perform Include/Exclude with everyone without contact info, but exclude everyone who has made a contribution.

Discuss

Extra credit brain teaser: You are organizing a public meeting for everyone in your database that has an email address.

However, you want to exclude politicians (a constituent type) *unless they are also an ally* (another constituent type).

How would you build this search?

Answer: Smart group for everyone with an email address: Everyone with email. Smart group for all politicians: All Politicians. Smart group for all allies: All Allies. Smart group that includes "All politicians" and excludes "All Allies": Non-ally Politicians. Lastly: Include Everyone with email, Exclude: Non-ally Politicians.

Exercise

PowerBase Measuring Engagement

20 minutes: Hand out exercise and ask everyone to fill it out. When everyone is done, ask for the results and see if they are the same.

PowerBase Dedupe and Merge

Overview

Managing duplicates is a critical part of maintaining a useful database. Powerbase offers a number of complex methods to properly avoid duplicates and merge ones that are created.

Objectives

All participants should finish this lesson understanding what a de-dupe rule is, how to create one and the workflow for finding and merging duplicates.

Requirements

Good math skills.

Materials

- Dedupe and Merge (https://network.progressivetech.org/node/1158)

Description

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

Discuss

Q: How do you know if two records in your database are the same person?

A: First name, last name and email is our recommended answer, but...

Q: What if you are importing records without an email address (sign in sheet or from another source).

A: First name, last name and email OR phone. Different situations call for different.

Balancing act between allowing duplicate records and avoiding improper merges.

FUN FACT: When you allow people to register for an event or make a contribution, you are inviting complete strangers to edit your database.

PowerBase Dedupe and Merge

Explain steps:

1. Define rules

2. Configure Powerbase touse rules

3. Find duplicates

4. Merge duplicates

Demonstrate

First Step: define rules

1. Display Find and Merge screen
2. Difference between individual and organization
3. Difference between supervised and unsupervised
4. Add new rule and explain weights and thresholds
5. Don't use length unless absolutely necessary!

Second Step: configure Powerbase to use rules

Show event page where you can specify which rule to use.

Third step: Find duplicates

Back to Contacts → Find and Merge duplicates

Explain batch process

Fourth Step: Merge

Also show merge contacts option in search results.

Importing Data into PB

Overview

Collecting information in spreadsheets and then moving them into PowerBase can be efficient, and we will learn how to do that for Contacts and Event Participants.

Objectives

Understand how information needs to be structured in order to be able to import successfully.

Requirements

Comfort with spreadsheet software, good understanding of how PowerBase creates contact records and event participant records.

Materials

- CiviCRM manual and wiki importing
  - https://docs.civicrm.org/user/fr/latest/common-workflows/importing-data-into-civicrm/
  - https://wiki.civicrm.org/confluence/display/CRMDOC/Importing+Data
- Spreadsheet functions tips sheet: https://network.progressivetech.org/node/1108
- Sample files to import (download both excel and final csv)
  - have EXCEL version of file to explain some tips
  - sample CSV file (or convert the excel version)

Description

50 Minutes TOTAL:

Importing Data into PB

- 10 Discussion
- 40 minutes – Demo Importing Contacts
- 40 minutes – Group practices imports and discuss duplicate contact file

Discussion

What do we import? Popcorn style question. Looking for: VAN data, sign up sheets, data from other databases, etc.

Will the data we are importing have duplicates? If so, is the data we are importing better or our existing data? Looking for: it depends.

INSTRUCT GROUP: Do not follow along on your screen, instead pay attention and watch. Everyone will have a chance to import a file later.

Clean data and setup CSV file for Import

Review the Excel sheet and Filter the spreadsheet

- Always to visual scan for problems
- Change headers so you will know what they are
- If importing a field that is drop down, value must be there

Convert the Excel sheet to a CSV file (or use the sample completed file)

For Duplicate Contacts

- Database data is better than imported data: **Skip**
- Database data is worse than imported data: **Update**
- Database data is better, but might be incomplete: **Fill**

Import your Contact File

Click on Contacts > Import Contacts

Review the following concepts & fields each screen:

Choose Data Source (Step 1 of 4):

Options for Duplicate Contacts

Open the duplicates' spreadsheet, delete the first two columns, save and then import them with the Step 1 option set to **Update** or **Fill**.

Update replaces data in PB with data in the spreadsheet. If the first name is different in the spreadsheet than it is in PB, if you choose **Update** it will change the first name. If you choose **Fill**, it will only import information into fields that are blank.

There is another kind of error, where PowerBase sees missing Related data. If you are importing Employer names, for example, any record that does not have an Employer will show up in this error spreadsheet.

Dedupe rule

Gotcha: default dedupe rule is unsupervised, not supervised (why? Because you are not supervising every single row being imported)

Strategies: If you are not importing email addresses, then a dedupe rule that depends on an email address won't work! Think through best strategy.

Date format

If you have columns with dates, they all need to use the same format. If you are not importing dates, you do not have to worry about this. If you get it wrong, PowerBase will let you know.

Geocode Addresses during Import

It's best to leave this unchecked. This can be a performance stopper for imports if PowerBase has to geocode each record, which means making calls to google geocoding provider for each contact. Once the data is imported into PowerBase, those records will be geocoded later based on the setting of scheduled jobs.

Load Saved Field Mapping

Let's get to the second screen in order to explain what a Field Mapping is. The first time you do this, there will not be a field mapping for your data.

Match Fields (step 2 of 4)

For each field in your spreadsheet (on the left hand side) you need to identify the field in PowerBase that will hold the data.

Once you map every field, you can choose to Save the mapping. You mostly want to do this because if you made a mistake, or forgot to add an option (or many other things that can happen), and you find yourself importing this sheet again (or another one with the same fields) you will want to be able to not

have to do this tedious work again. If you save it here, it will be available in Step 1, at the bottom.

Preview (step 3 of 4)

Are we ready to import? Verify the total number. Does it match how many records you have in your spreadsheet?

Are there any errors in our data? Did we forget an option? Are we trying to import an invalid email address?

If there are errors, PowerBase will have a spreadsheet listing the error with each row. You can download that spreadsheet, open it and fix the errors on the main spreadsheet and start back at Step 1. Or you can finish the import and deal with the spreadsheet of mistakes afterwards.

ALWAYS create a new group for this import. If for some reason you totally screwed it up, you will have an easy way to undo: delete all the contacts in the new group you created!

You can also add these to an existing group, or more than one group, along with the new one that you are always creating.

Summary (step 4 of 4)

The final screen reports the successful imports along with Duplicate Contacts and Errors. If you have set the import to add all contacts to a Group or Tag, you can click through to see your imported contact records.

Duplicates will not be imported but you will have a spreadsheet available to download so you can continue working with those records.

Note: Review what happens with Duplicates when Folks start importing the same CSV file into PowerBase

TIP

Importing participants, activities
Don’t do it. Instead, import contacts then assign.

Group Exercise

- Have folks download their own sample CSV file here: https://network.progressivetech.org/node/1165
- Each person can practice doing an import

Online Data Collection

Overview

Online organizing means collecting information from people and disseminating information to people via the Internet, as opposed to via the phone, door knocking, conferences etc. This lesson covers collecting information from interested people.

Objectives

Familiarize ourselves with the various ways to collect data online: Web forms, contribution pages, event pages, membership pages, petitions. Also cover: Social Media integration.

Requirements

Familiarity with social media, online forms

Materials

Creating profiles hand out. Creating Web forms link

Description

30 minutes total

10 minutes: Start with a conversation – What is online organizing? When collecting information, what is your strategy? Looking for: build loyalty among supporters (CVH bernie/hilary), educate about issues in form of petition, collect contact information, etc.

10 minutes: What does PowerBase currently offer? Demonstrate examples of existing integrations: CVH, VOCAL, Texas Environment. Use PDF slide show.

Review the major methods:

- Custom Fields: The beginning of it all. Explain "component" and how you have to carefully choose what component to extend.
- Profile: Simplest, can be added directly to your web site. Limitations: No event registration, contribution, or activity. Just simple adding of contacts.

Online Data Collection

Demonstrate the user-facing sides of these:

- Petition: Not just for petitions! Great choice for education campaigns. Can do simple petition OR complex petition with emails sent to targets.
- Webform: advanced! Useful if you want to record custom activities.

10 minutes: How do we interact with social media? What strategies to people use? Ask question, then answer: Drive people to your database.