PowerBase Entering Canvassing Results

Overview

Entering Canvassing Results covers the basics of logging in and doing simple data entry of contacts from a convassing 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.

Materials

- Exercises: a sample walk sheet
- Instructions for Groups: login and change passwords
- Instructions for Groups: create individual contact

Description

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

Demonstrate

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.

Staff Responsable
Explain that this next task is an advanced task, however, for the purposes of our training, we need to have everyone in the room entered as a “staff” person.

Have every one follow along:

Administer → Customize Data and Screens → Custom Fields

Constituent Info → View and Edit Custom Fields

Staff Responsible → Edit Multiple Choice Options

Ask everyone to add their name.

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.

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.

Campaign Components

Overview

Together, generate the steps commonly taken when running a political campaign.

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.

Requirements

Participants must have basic familiarity with grassroots political campaigns.

Materials

None.

Description

The lesson should take about 20 minutes.

Demonstrate

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.

Write on white board/post paper:

- Door knocking to gather names

Exercise

Ask the group to say what the other steps are in their political organizing work. Try to get as many people as possible to contribute steps. Write them down as you hear them.

Your goal is to get something along the lines of the following steps:

- Door knocking to gather names

- Phone calls to invite to regular membership meeting
- Follow up post cards to remind people about the meeting
- Email thanking them for attending, with notes.

After completing your list – underline the ones we will be covering in the training.

PowerBase Components

Overview

Provide a brief overview of the various components of PowerBase, with an emphasis on how PowerBase tracks your interaction with your base.

Objectives

Convey the difference between a spreadsheet and a organizing database, introduce ideas of activities and relationships. The goal is to connect the components of PowerBase with the components of an actual political organizing campaign (as discussed in the previous section).

Requirements

People must have the components of a campaign fresh in their minds as they consider how these components relate to the database.

Materials

Instructions for Groups: Adding activity to contact

Instructions for Groups: Adding a relationship

Description

This lesson should take about 45 minutes.

Demonstrate

Review each of the main menus, explaining that Contributions, Mailing, Events, Memberships, and Campaigns are all ways people interact with your organization.

Explain concept of “dashboard” - showing contribution, event, etc.

Pull up a single record – show relationship between tabs of a single person and the menu items. Use the simple search to find the record (and demonstrate that search method – with last name, first name).

Explain concept of a static group (to setup a contrast with smart groups which will come later). Static groups are for a collection of contacts that won't change frequently, for example: Board of Directors.

Add a contact to the Board Of Directors group (this will also be used later, in the search lesson).

Explain concept of “Activities” - how records sometimes show up in two places.

Demonstrate adding an activity to a contact: Show how to add a door knocking activity.

Explain concept of relationships.

Demonstrate adding a relationship to a contact.

Questions/Answers

Exercise

Part 1: Ask for volunteers to explain which components they are using in their organizational database and which they are not using and why.

Part 2: What is the difference between a group and a relationship? What are examples of using each one?

Part 3: Ask participants to update their contacts with a Door Knocking activity that includes the notes AND a relationship (if specified).

Part 4 (extra credit): Look up, in your organization's database, the following records and be prepared to report back.

- Someone on your board of directors. Are they in a Board of Directors group?
- Someone you know works for an organization that is your database. Is their employer set?
- Someone you know is a family member of another person. Is that relationship set?

Researching Your Base

Overview

Researching your base 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.

Materials

- Exercise: Search clues
- Instructions for Groups: basic searching

Description

This lesson takes approximately 60 minutes.

Demonstrate

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.org (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

- Find Contacts: simple way to find contacts by group
    - Contact type (to restrict to individuals or organizations)
    - Demonstrate searching on a (static) group – Search for everyone in the Board of Directors group and show the individual contact you added in the previous lesson.
    - Briefly cover tag: similar to adding someone to a group – we generally recommend against using tags
- Advanced Search
    - The main interface for searching
    - Explain how to expand/collapse sections
    - 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.
    - Explain use of search views for displaying different fields
    - Show visual feedback on search terms
    - Demonstrate how to modify search terms
    - Explain importance of Reset button

Exercise

Find number of contacts returned by each of the exercise searches

Review answers from exercise, questions and answers

Organizing 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.

Materials

None

Description

This lesson should take approximately 30 minutes.

Demonstrate

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.

Demonstrate: pick two people and have them each re-assign one of their contacts to the other person.

Organizing your base into groups

Explain: Smart Group caching means it will take up to 15 minutes for the change to be reflected: please check your group again in 15 minutes!

What if you are responsible for someone, but they are going to be out of town for 6 months and you don't want them to show up on your list?

Go to Contacts → Manage Groups and find your group. Click to show all contacts.

Click on one person and select Remove From Group option to demonstrate that you can remove someone from a group, even a smart group.

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

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 dataase that returned useful information, create smart groups based on it.

Events

Overview

Introduction to creating Events.

Objectives

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

Requirements

Basic familiarity with searching.

Materials

- Creating a CiviCRM Event from the CiviCRM Book

Description

30 minutes

Demonstrate

Activity Vs Event (5 minutes)
If you only want to track that someone was at an event, using an activity is the way to go – far simpler.

With Events you can:

- 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
- And more

Demonstrate creating Event
Create an Event for a regular membership meeting. If people are following along, ask them to add their name to the event name to avoid confusion. For the demo event – put down: Membership Meeting – REAL. This is the meeting we will use for turn out, etc.

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, pick an address in Youngstown:

1123 Jaronte Dr, Youngstown, OH

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)
We won't do online registration – because we do direct outreach for participation.

Page 5 (Schedule Reminders)
Skip – advanced topic

Page 6 (Tell a friend)
Skip – advanced topic

Events

Page 7 (Personal campaign pages)
Skip – advanced topic

Exercise
Assess whether they need to create events or not (most people will have followed along).

Event Turnout

Overview

How to use PowerBase to organize phone calls to turn people out to a meeting.

Objectives

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

Requirements

Basic familiarity with searching.

Materials

- Step by step event turn out process (not created yet)

Description

60 minutes

Demonstrate

Explain: We are now going to demonstrate the event turnout process. This process facilitates phone calls for meeting attendance – allowing to make and track multiple calls for turn out.

Write out the following steps on big paper and explain each of them.

Create a group. These are the people you are going to try to turn out (this step is done: we'll use your “Responsible staff”)

Add your people to the event. PowerBase allows you to create a relationship between a person and an event. We start out with setting their relationship to “interested.” If they attend, we change it to “attended.”

Find your people (again), run batch update. There are certain things you do when your showing contacts (such as add to an event).

Event Turnout

There are different things you can do if you list them as event participants. We need to list them as event participants in order to update their participation status.

Now – demonstrate each step via the projector.

Exercise
Should run through this process with their own group and the REAL event (so we can see reporting, etc), record phone calls. Remind people: next, we will be doing reporting to see how your calls went!

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.

Materials

Presentation: Chapter from CiviCRM Book on sending mail

Description

60 Minutes total

Demonstrate

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 CiviMail
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

CiviCRM 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).

Page 1:
Naming conventions: name of mailing and subject line can be different! The name only shows up to PowerBase users. Pick a good name.

Remove duplicate emails: always check!

Include/Exclude: explain

Page 2
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.

Page 3:

- Demonstrate how selecting a template changes the html box
- Explain difference between html and plain text – importance of keeping plain text empty (so it is auto-generated from html)
- Header and Footer: importance of using the general footer (CAN Spam act)
- Demonstrate adding a link to the Event Info page

Page 4:
Value of testing: You must test in many email clients, on phone, etc.

Page 5:
Immediately doesn't mean immediately.

Exercise
Everyone must create their own mass mailing to their contacts.

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.

Materials

- Instructions for groups: Contribution Report Templates Overivew
- Instructions for Groups: Creating Reports – Basics
- Instructions for Groups: PB tip – Add Dashlet to Homepage

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 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.
- 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 is a generic report that doesn't show the turn out effort fields.

Display fields: Invitation Response, Second Call Response, and Reminder Response.

In addition, it 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.

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.