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/

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

Training Category:
PowerBase

Fundamentals: Opening

Back to Fundamentals

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

Fundamentals: Review of agenda

Back to Fundamentals

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.

Attachment	Size
day-one-summary.pdf	1.01 MB
day-one-summary.odg	1.13 MB

Fundamentals: Entering Canvass Results

Back to Fundamentals

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.

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 Responsable

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

Back to Fundamentals

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.

Excercise

Write activites 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 Excercise

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

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

Fundamentals: Searching

Back to Fundamentals

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

Back to Fundamentals

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

Back to Fundamentals

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:

Don't follow along on your computers: Watch, then everyone will have a chance to create their own.

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:

- Click on link to event info and then follow to event registration
- Show how to manually add registrant via the back end (register two people)
- Show how to search for all registered participants and update event participant status to change from registered to attended.

Final Exercise

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

Training Category:
PowerBase
Trainee Handouts:
Creating an event

Fundamentals: Contribution Pages

Back to Fundamentals

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

Back to Fundamentals

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?

Back to Fundamentals

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

Back to Fundamentals

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.

Training Category:
PowerBase
Trainee Handouts:
Creating an email using Mosaico

Fundamentals: Reporting

Back to Fundamentals

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

Trainee Handouts:
Add a dashlet to your dashboard
Key concepts with Reports
Creating reports
Using Reports

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