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

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.

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

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?

Wrong answer: Search for membership payments between 1/1 last year – 12/31 last year (that would include people who made a payment this year)

Right answer: Summary fields, Date range ending December 31 of last year. These people have not made a membership payment since December.

Exercise

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.

Conclusion: How are we going to use this on a day-to-day basis?

PowerBase Segmenting your Database

Overview

Segmenting your database is about more than advanced searching techniques – it involves thinking through who you constituents are and developing strategies for how to reach them effectively.

Objectives

All participants should finish this lesson with an idea of how they think of their organization's constituents as well as practical tips on how to unusual searches.

Requirements

Strong familiarity with advanced search.

Materials

- Making smart groups with good and bad mailing addresses (https://network.progressivetech.org/node/1094)
- Case Study: Purging useless records (https://network.progressivetech.org/node/1103)
- Tips for creating donor groups (https://network.progressivetech.org/system/files/Fundraisers%20Cheat%20Sheet%20for%20Creating%20Donor%20Smart%20Groups_0.pdf)
- Tips on Advanced search (https://network.progressivetech.org/system/files/Tips%20on%20Advanced%20Search.pdf)

Description

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

Discuss

PowerBase Segmenting your Database

In addition to “Advanced Search” there are several even more powerful ways to search your database. For example, what if you want to find everyone with a a complete postal address? What does that even mean?

Demonstrate

Search Builder
Find everyone with a non-empty city, state and zip code.

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

Put in a smart group called: Everyone with a mailing address

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 an intern to email or call all of your leaders (from previous search) who have an incomplete address? How would you describe that search in plain english?

Include/Exclude
First add the engagement leadership group created in previous lesson. Then add “Everyone with a mailing address” as exclude group.

Lookup engagement leadership smart group: how do you learn what criteria was used to create it?

Discuss
Extra credit brain teaser: You are organizing a membership meeting for all your allies and you want to exclude politicians (both are constituent types). However, some politicians are also marked as allies. If a politician is an ally, you want to include them. If they are not an ally you want to exclude them. How would you build this search?

Answer: 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 All Allies, Exclude: Non-ally Politicians.

Unsubscribe and mailing group strategy
Unsubscribe vs Opt out: one removes you from the smart group (choice of smart groups to be removed from) and one opts you out of all mailings. If you send an email to dozens of groups, they will all be listed when someone clicks

the unsubscribe link (don’t create group called “morons who have been ignoring us”). Also, try to send to only one group, not many groups. Create a group of groups if necessary.

Removing people from a smart group doesn’t remove them from the smart group. Say what? CiviCRM funkiness. The remove option is only used with mailings. If someone is removed from a smart group they won’t get a mailing sent to the smart group, but they will turn up in search for people in that group.

Tips

- Create generic and re-usable groups for common mailings. If you send a newsletter, create a newsletter group and always send to this group.
- Educate everyone in your organization on the meaning of each group and when to use them
- Don’t make a group a mailing group unless you intend to send it email. You can always edit the group later to make it a mailing group
- Don’t nest smart groups unless you have to

Exercise

Review all materials. Does any of it apply to your scenario or your organization?

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:

- 10 Discussion
- 20 minutes – Demo Importing Contacts
- 20 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.

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 the sample CSV or have it on a USB so folks can copy
- Each person can practice doing an import

- Once someone gets duplicates – pause and review the duplicate file (may need to grab it on USB) and discuss options folks can do with the duplicate file – e.g. import with “Update” or “Fill” Option

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.

Time permitting, review the major methods:

- Profile: Simplest, can be added directly to your web site. Limitations: No event registration, contribution, or activity. Just simple adding of contacts.
- Event and Contribution pages – self explanatory. Use if you are doing an event or contribution page – requires a custom theme.

Online Data Collection

- 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.

Mobilizing Your Base with PowerBase

Overview

Discuss and Demonstrate ways to use PowerBase to mobilize people to take actions in campaigns.

Objectives

Understand the different features in PowerBase that can support ways folks mobilize their constituents to take action.

Requirements

Familiarity with organizing strategies used to mobilize people to take action; a good understanding of how to search, segment lists, and create smart groups in PowerBase; a basic understanding in creating profiles and custom data fields especially for activities; basic understanding of creating reports.

Materials

- Show examples (using examples from other PowerBase groups if possible) of how to use PowerBase for: email, sms, phonebanking, walklists, peer-to-peer for followup, etc.
- White board or Butcher paper
- Share resources:
    - Email example: mobilizing examples.pdf
    - SMS resource: https://network.progressivetech.org/node/992
    - Phonebanking: https://network.progressivetech.org/system/files/handout-fr-phonebanking.pdf
    - Personal Campaign pages: https://network.progressivetech.org/node/1029

Mobilizing Your Base with PowerBase

    - PTP's article in GIFT Journal on sprint campaigns: ttps://network.progressivetech.org/sprint-peer-campaigns

Description

45 minutes Total:

- 10 minutes Discussion
- 25 Demonstrate the menu of PowerBase features that can be used for mobilization
- 10 Brainstorm ideas of workflow of how to prepare, plan, and use PowerBase for mobilization examples from the group

Discussion

Discuss with group what we mean by mobilizing your base – outreach strategies to get their constituents to take an action, e.g. email, sms, etc.

Ask the group what outreach strategies or tactics they use to get folks to take action.

Demonstrate

Based on the group discussions and ideas, demonstrate the various features in PowerBase that can support mobilization efforts. In particular, demonstrate by showing examples (include real examples from other PowerBase groups as needed), and explain the features and terminology specifically for:

- **Email**
    - discuss strategies: targeting audience with appropriate msgs & subject lines; email drip campaigns

Mobilizing Your Base with PowerBase

- show mobilizing examples.pdf of email example

- **SMS**
  - Share resource: https://network.progressivetech.org/node/992

- **Phonebanking**
  - Explain phonebanking feature and refer to document: https://network.progressivetech.org/system/files/handout-fr-phonebanking.pdf
  - Show a phonebanking screen with questions to capture

- **Door-knocking - Walklists**
  - Explain that walklists in PowerBase are used for contacts that are known and you want to do followup to get them to take an action (voter database tools like VAN and PDI have much more robust cutting turf tools and during electoral cycle, we advise folks use their voter tool, then export the contacts they want to do further engagements into PowerBase.
  - Demonstrate that it's helpful for map contacts in PowerBase to see where folks are concentrated geographically so that canvassing/door knocking is more efficient. Also who how to use proximity search.
  - Show a sample walklist in PowerBase with questions to capture

- **Peer-to-Peer Campaigns**
  - used primarily in grassroots fundraising where staff and board reach out to their family, friends, and personal networks to raise funds for a campaign or cause – uses multiple channels such as email, social media, phonebanking, etc.
  - show mobilizing examples.pdf of peer campaigns

Mobilizing Your Base with PowerBase

    - Share resource on personal campaign pages: https://network.progressivetech.org/node/1029
    - refer to PTP's article and slides on sprint campaigns for grassroots fundraising: https://network.progressivetech.org/sprint-peer-campaigns

- **Social Media**
    - is both an online strategy and a mobilizing strategy (refer to Online Strategy section) – remind them to use links to PowerBase public pages rather than social media tools like facebook events.

Brainstorm

After showing the features that folks can use for mobilization (and can include online organizing strategies), ask group for ideas for mobilization strategies/tactics and layout a potential workflow to gets folks to think about the data they want to track, and the workflow they will need to use in PowerBase. Draw/diagram ideas on the board or on paper.