CiviCampaign and CiviEngage to change the world

Alice Aguilar, Josue Guillen, Jamie McClelland - PTP
Xavier Dutoit - TTTP
For the next 50 Minutes...

- What is campaigning?
- CiviCampaign
  - Petition
  - Survey
- CiviEngage for WalkLists & PhoneBanks
- Using Workflows to make your database sing!
- Measuring Impact
  - Activity
  - Engagement
  - Result
  - In Social Networks
- What’s coming!
What is campaigning?

An operation or series of operations, e.g. tasks and strategies, energetically pursued to accomplish a purpose: (duh)

A Goal: fundraising, a vote, an issue, membership increase...
A Target: politicians, members, specific community...
A ctivities: emails, events, petitions, surveys...
A Timeframe
Wide or Deep?
CiviCampaign

Powerbase Sandbox Site

CiviCRM includes several optional components which give you more tools to connect with and engage your constituents.

Settings - Enable Components

Enabled components are listed in the right-hand box. Disabled components are listed in the left-hand box. Highlight a component and click the arrow to switch the status of that component. To remove a component from the list, highlight it and click the "<< Disable" button. Once the changes are complete, click "Save."
Powerbase Sandbox Site

Campaign Dashboard

Campaigns

Surveys

Petitions

Showing 1 to 1 of 1 entries

my big campaign

August 11th, 2011 11:12 PM

Constituent Engagement

In Progress

Yes

Edit | Disable | Delete

Powered by CiviCRM 3.4.4. CiviCRM is openly available under the GNU Affero General Public License (GNU AGPL).
Download source | View issues and report bugs | Online documentation

Access Keys: |

No additional information can be extracted from the image.
CiviPetition

example: Worse EU Lobby award by FoEe, CEO, LobbyControl, SpinWatch, Oxfam... Attac...

Custom data (Nominees...)
Profile (Contact & activity fields)

Custom Search
CiviCampaign's Survey

HIV Positive Families

Yearly event

Phone campaign to push event registration

'Survey'

- Reserve respondent
- Interview respondent
  - record answer
    - (coming/not coming)
  - Not reached
CiviEngage: What's it For?

- creates a 'common platform' for community organizers:
  - gives them a package out of the box to really move their work
  - use common tool to tech skills and strategy
  - tool helps organizers work more efficiently

- the package of enhancements meets 85-90% of their common needs

- becomes a vehicle to build a community with a shared vision for future development

- Integrates the features of CiviCampaign
## Walklists or Phonebank lists

### Record WalkList Responses

Click **record response** button to update values for each respondent as needed. Click **Release Respondents** button below to release any respondents for whom you haven’t recorded a response. Click **Reserve More Respondents** button if you need to get more respondents to interview.

### Show [10] entries

<table>
<thead>
<tr>
<th>Name</th>
<th>Have you had rain?</th>
<th>Do you have a Well?</th>
<th>How much water do you use a month?</th>
<th>Note</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>AARON, LIBBY</td>
<td>Yes</td>
<td>Yes</td>
<td>Under 500</td>
<td></td>
<td>Completed</td>
</tr>
<tr>
<td>AARON, FORTUNE</td>
<td>Yes</td>
<td>No</td>
<td>Don’t Know</td>
<td></td>
<td>Completed</td>
</tr>
<tr>
<td>ACRIS, SALVATORE</td>
<td>- select -</td>
<td>- select -</td>
<td>- select -</td>
<td></td>
<td>- select -</td>
</tr>
<tr>
<td>ADAMIAK, LEO</td>
<td>- select -</td>
<td>- select -</td>
<td>- select -</td>
<td></td>
<td>- select -</td>
</tr>
<tr>
<td>ADAMS, CHARLES</td>
<td>- select -</td>
<td>- select -</td>
<td>- select -</td>
<td></td>
<td>- select -</td>
</tr>
<tr>
<td>ADAMS, DARLA</td>
<td>- select -</td>
<td>- select -</td>
<td>- select -</td>
<td></td>
<td>- select -</td>
</tr>
<tr>
<td>ADAMS, FRANCES</td>
<td>- select -</td>
<td>- select -</td>
<td>- select -</td>
<td></td>
<td>- select -</td>
</tr>
<tr>
<td>ADAMS,</td>
<td>- select -</td>
<td>- select -</td>
<td>- select -</td>
<td></td>
<td>- select -</td>
</tr>
</tbody>
</table>

### Actions

- Update Response
- Record Response
Cover Sheet for Survey Report (Detail)

**Result Set**

<table>
<thead>
<tr>
<th>C</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>NH</td>
<td>Not Home</td>
</tr>
<tr>
<td>MV</td>
<td>Moved</td>
</tr>
<tr>
<td>WA</td>
<td>Wrong Address</td>
</tr>
<tr>
<td>WN</td>
<td>Wrong Number</td>
</tr>
<tr>
<td>DE</td>
<td>Deceased</td>
</tr>
</tbody>
</table>

Survey Title = My Big survey

**Response Codes**

Q1 = Have you had rain?

<table>
<thead>
<tr>
<th>Y</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>No</td>
</tr>
<tr>
<td>U</td>
<td>Undecided</td>
</tr>
<tr>
<td>D</td>
<td>Declined</td>
</tr>
</tbody>
</table>

Q2 = Do you have a Well?

<table>
<thead>
<tr>
<th>Y</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>No</td>
</tr>
<tr>
<td>U</td>
<td>Undecided</td>
</tr>
<tr>
<td>D</td>
<td>Declined</td>
</tr>
</tbody>
</table>

Q3 = How much water do you use a month?

<table>
<thead>
<tr>
<th>&lt;10 = Under 100 gallons</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;500 = Under 500</td>
</tr>
<tr>
<td>500+ = Over 500</td>
</tr>
<tr>
<td>DK = Don’t Know</td>
</tr>
</tbody>
</table>
### Survey Report (Detail)

<table>
<thead>
<tr>
<th>Grouping(s)</th>
<th>Survey</th>
<th>Respondent Status</th>
<th>Have you had rain?</th>
<th>Do you have a Well?</th>
<th>How much water do you use a month?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Street Name &amp; Odd / Even Street Number</td>
<td>Is My Big survey</td>
<td>Y</td>
<td>N</td>
<td>U</td>
</tr>
<tr>
<td><strong>ALESSI PATRICIA</strong></td>
<td>BAYMAR DR</td>
<td>Is equal to Reserved</td>
<td>Y</td>
<td>N</td>
<td>U</td>
</tr>
<tr>
<td><strong>ALESSI JOSEPH</strong></td>
<td>BAYMAR DR</td>
<td>Is equal to Reserved</td>
<td>Y</td>
<td>N</td>
<td>U</td>
</tr>
</tbody>
</table>

2 rows listed.

### Survey Report (Detail)

<table>
<thead>
<tr>
<th>Grouping(s)</th>
<th>Survey</th>
<th>Respondent Status</th>
<th>Have you had rain?</th>
<th>Do you have a Well?</th>
<th>How much water do you use a month?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Street Name &amp; Odd / Even Street Number</td>
<td>Is My Big survey</td>
<td>Y</td>
<td>N</td>
<td>U</td>
</tr>
<tr>
<td><strong>ANGEL O. JOHN</strong></td>
<td>CAROLTA DE</td>
<td>Is equal to Reserved</td>
<td>Y</td>
<td>N</td>
<td>U</td>
</tr>
</tbody>
</table>

1 row listed.

### Survey Report (Detail)

<table>
<thead>
<tr>
<th>Grouping(s)</th>
<th>Survey</th>
<th>Respondent Status</th>
<th>Have you had rain?</th>
<th>Do you have a Well?</th>
<th>How much water do you use a month?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Street Name &amp; Odd / Even Street Number</td>
<td>Is My Big survey</td>
<td>Y</td>
<td>N</td>
<td>U</td>
</tr>
<tr>
<td><strong>ANDERSON ERNEST</strong></td>
<td>CASTLE CT</td>
<td>Is equal to Reserved</td>
<td>Y</td>
<td>N</td>
<td>U</td>
</tr>
</tbody>
</table>
Measuring Engagement

How do you measure the success of your outreach efforts?

How do you track how constituents, members interact with your organization or programmatic work or campaigns?

CiviEngage's
• Engagement Index
• Leadership Level
Engagement Index

- Organizers can rank an index or level of engagement for particular activities

Leadership Level

- Organizers can rank an overall Leadership Level for the individual contact
### Engagement Template

#### Activity Date
Between August 1st, 2011 and

#### Activity Type
Is one of Meeting, Phone Call

<table>
<thead>
<tr>
<th>Target Contact Name</th>
<th>Engagement Level</th>
<th>Assignee Contact Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADAMS, CHARLES</td>
<td>1.50</td>
<td></td>
</tr>
<tr>
<td>ADAMS, JACQUELINE</td>
<td>2.00</td>
<td></td>
</tr>
<tr>
<td>ADAMS, IDELLA</td>
<td>2.00</td>
<td></td>
</tr>
<tr>
<td>HAGAN, EVELYN</td>
<td>2.00</td>
<td></td>
</tr>
<tr>
<td>HAGEMAN, DONNA</td>
<td>2.00</td>
<td></td>
</tr>
<tr>
<td>HAGEMAN, GEORGE</td>
<td>2.00</td>
<td></td>
</tr>
<tr>
<td>HACKETT, VERA</td>
<td>2.50</td>
<td></td>
</tr>
<tr>
<td>HALEY, EMMA</td>
<td>2.00</td>
<td></td>
</tr>
<tr>
<td>HACK, KAREN</td>
<td>2.50</td>
<td></td>
</tr>
<tr>
<td>HACK, WILLIAM</td>
<td>2.50</td>
<td></td>
</tr>
<tr>
<td>HADDOX, DOROTHY</td>
<td>2.50</td>
<td></td>
</tr>
<tr>
<td>HADDOX, HARRY</td>
<td>2.50</td>
<td></td>
</tr>
<tr>
<td>HACKETT, ALFONZO</td>
<td>2.50</td>
<td></td>
</tr>
</tbody>
</table>
We want a Strategic Database!

PowerBase
The Database for Community Organizers
Ourpowerbase.net
(CiviCRM: CiviEngage + CiviCampaign, plus hosting, support, training)

We want to Strategically use that Strategic Database!
Using Workflows

Articulate the work, processes, and protocols in your Campaign

Making your database work for you
Understand the Goals of your Work: Mapping Organizational Workflows

Excerpted & Edited from Center for Media Justice, Lisa Jervis, 2011

Member Engagement Workflow

- Anchor member
  - Delegation/event recruitment
    - Spreadsheets
  - Events/delegations
    - CiviCRM
    - Salsa
  - Eval and Reporting Tool
  - Narrative reports

- Regional or general member
  - Digital Dialogue/webinar promo
  - Maestro/ReadyTalk systems
  - F2F and webinars
  - Quickbooks
  - Grants award

- Campaign work
  - Selection process

- Strategic Action Fund RFP
  - Apps submitted

...look for gaps of information
Social Media Outreach Management

Legend:
- Task
- Task with Sub Process
- Decision
- Deliverable
- Data
- Start/End
Develop Culture of Data Use

The Big WHY?

Do you Change or Reinforce your strategies?

Got Data?

What does the Data tell you?

How does information flow?
Mesure response

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Country</th>
<th>EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sonia</td>
<td>ALFANO</td>
<td>Italy</td>
<td>4k</td>
</tr>
<tr>
<td>Rita</td>
<td>BORSELLINO</td>
<td>Italy</td>
<td>3k</td>
</tr>
<tr>
<td>Eva</td>
<td>JOLY</td>
<td>France</td>
<td>2k</td>
</tr>
<tr>
<td>Rosario</td>
<td>CROCETTA</td>
<td>Italy</td>
<td>1k</td>
</tr>
<tr>
<td>Margrete</td>
<td>AUKEN</td>
<td>Germany</td>
<td>1k</td>
</tr>
<tr>
<td>David</td>
<td>CASA</td>
<td>Italy</td>
<td>1k</td>
</tr>
<tr>
<td>Sergio Gaetano</td>
<td>COFFERATI</td>
<td>Italy</td>
<td>1k</td>
</tr>
<tr>
<td>Luigi</td>
<td>de MAGISTRIS</td>
<td>Italy</td>
<td>1k</td>
</tr>
<tr>
<td>Karima</td>
<td>DELLI</td>
<td>Germany</td>
<td>1k</td>
</tr>
<tr>
<td>Isabelle</td>
<td>DURANT</td>
<td>Germany</td>
<td>1k</td>
</tr>
<tr>
<td>Tanja</td>
<td>FAJON</td>
<td>Russia</td>
<td>1k</td>
</tr>
<tr>
<td>Ana</td>
<td>GOMES</td>
<td>Spain</td>
<td>1k</td>
</tr>
<tr>
<td>Catherine</td>
<td>GRÉZE</td>
<td>France</td>
<td>1k</td>
</tr>
<tr>
<td>Vincenzo</td>
<td>IOVINE</td>
<td>Italy</td>
<td>1k</td>
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<tr>
<td>Olmo</td>
<td>JUNQUERAS VIES</td>
<td>Spain</td>
<td>1k</td>
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<tr>
<td>Sandra</td>
<td>KALNIETE</td>
<td>Germany</td>
<td>1k</td>
</tr>
<tr>
<td>Ádám</td>
<td>KÖSA</td>
<td>Germany</td>
<td>1k</td>
</tr>
<tr>
<td>Philippe</td>
<td>LAMBERTS</td>
<td>France</td>
<td>1k</td>
</tr>
<tr>
<td>Eva</td>
<td>LICHTENBERGER</td>
<td>Germany</td>
<td>1k</td>
</tr>
<tr>
<td>Monica Luisa</td>
<td>MACOVEI</td>
<td>Italy</td>
<td>1k</td>
</tr>
<tr>
<td>Edward</td>
<td>Mc MILLAN-SCOTT</td>
<td>UK</td>
<td>1k</td>
</tr>
<tr>
<td>Claude</td>
<td>MORAES</td>
<td>Portugal</td>
<td>1k</td>
</tr>
<tr>
<td>Justas Vincas</td>
<td>PALECKIS</td>
<td>Lithuania</td>
<td>1k</td>
</tr>
<tr>
<td>Antigoni</td>
<td>PAPADOPOULOU</td>
<td>Greece</td>
<td>1k</td>
</tr>
<tr>
<td>Gianni</td>
<td>PITTELLA</td>
<td>Italy</td>
<td>1k</td>
</tr>
</tbody>
</table>
Signatures by country
Follow your campaign on twitter

tweet civi
twitter users->civi contact
tweets -> activities
graph -> relationship
tweet/DM from civi

Make it Happen?
What’s Coming!
Still in the works…

Measure Engagement (activities) by Date

- Organizers measure engagement by number or types of activities recorded for individuals over a date range
## Measure engagement (activities) by date

### Edit Search Criteria

- Select Records: 
  - All 60 records
  - Selected records only

### 60 Contacts

- **ANDREWS, THOMAS**: Count 3, Engagement 1.5000
- **ALLEN, RICHARD**: Count 4
- **ANDREI, MARSHA**: Count 3
- **ADAMS, MARK**: Count 6, Engagement 3.0000
- **ANTHONSEN, MARIAN**: Count 3
- **BASSETT, CAROL**: Count 3
- **BACHINGER, MICHAEL**: Count 3
- **HAGAN, EVELYN**: Count 2, Engagement 1.5000
- **BAAL, THERESA**: Count 3
- **ADAMS, CHARLES**: Count 9, Engagement 1.7500
- **ANDERSON, THURMAN**: Count 3
- **HACK, WILLIAM**: Count 3, Engagement 2.0000
- **ANDERSON, ERNEST**: Count 3
- **BARCLEY, TOMA**: Count 3

Page 1 of 2
Save this map so when you do this again in 6 months you can track your progress.
Now in Progress…

UI Changes
See the fields or questions…

Title: Housing Survey

Campaign: - select -

Activity Type: Survey

Profile: Supporter Profile

Supporter Profile

Contacts, Activities, Surveys (Add fields)

- First Name: Individual->first_name
- Last Name: Individual->last_name
- Email Address: Contact->email
Drag and Drop fields to your Survey…
Edit Fields/Questions on the fly…
CiviCampaign & CiviEngage to Change the World

Status quo is not acceptable
Change is possible
You can make it happen
CiviCRM can help you
  • identifying your targets
  • Identifying your relays and supporters
  •.measure the impact
  • Target your effort/budget
  • Build upon the previous campaign
  • Prepare for the next one
Strengthening Community Organizing with Effective Technology

Xavier Dutoit
Tech To The People
xavier@tttp.eu

changing the world, one byte at a time...