



Design Decision/Requirements document

The purpose of this document is to record options for recording contributions in the CiviCRM database when the donor has given the gift for a specific purpose, e.g., funding an event or a purchase.

This has become an issue because of February, 2022 emails concerning a donation by a current NSCS Vice President to fund an upcoming session with an outside consultant. There was a suggestion that a new category in QuickBooks, the accounting software used by the Treasurer, might be beneficial because “we hope that eventually we’ll have people underwriting concerts and such.”

Current Practices

Designated Use Funds

When CiviCRM was implemented a design decision/requirement document called **Design decision for donations** was created (last updated February 13, 2014). One of the requirements was for handling donations to the following three “designated funds” already in use:

David Dynes Larson Memorial Gift

This fund was established to honor the memory of David Dynes Larson, Music Director of the North Shore Choral Society from 1973 to 1984. Donations and memorial gifts to the fund are to be used for activities that improve the performance and musicianship of the North Shore Choral Society. Donations may be made directly to this fund.

Donald Chen Young Artist Award (DCYAA)

NSCS Music Director Donald Chen retired at the end of our 72nd season after over twenty-four years with the Choral Society. To honor Dr. Chen, the North Shore Choral Society established the Donald Chen Young Artist Award which will reward talented young singers with solo roles in one of our concerts each season. Donations may be made directly to this fund.

Ruth A. Gockel Memorial Fund

This fund was established in 2002 with a bequest by Ruth A. Gockel, a long-time singer, Principal Benefactor, and former Society president. Ruth was the daughter of the long-time pastor of St. John’s Lutheran Church in Wilmette, where the NSCS Board used to hold its monthly meetings. Ruth’s intent was that this fund be used in any way the Board decided. Donations may be made directly to the fund.

After exploring various options, a design decision was made: three ‘Organization’ Contacts were established in CiviCRM to receive soft credits whenever there are direct donations to these funds. These ‘organizations’ were added to the Contact Group “NSCS Designated Use Funds.” The soft credits are accessed when formatting patron page information for concert booklets.

80th Anniversary Fund

During the North Shore Choral Society 80th Season, members were solicited to give to a fund to celebrate the anniversary. Because there was a request to identify donors to this fund in the concert booklet, a special **Campaign** (“80th Fund”) was established in CiviCRM to identify these gifts, rather than specifying the usual annual **Campaign** (“80th Season 2015-2016”) or just entering a comment on the contribution record. 22 members donated to the fund, in amounts ranging from \$8 to \$108.

Other “designated use” contributions

Occasionally there will be a contribution (usually given by a member) designated for a specific use. In the past this has only been documented using a comment field within CiviCRM. The comment field is



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included on the Patron Thanks .csv file sent to the Patrons Coordinator, but otherwise is not included in any reporting. Theoretically, CiviCRM contribution records could be queried to look for specific text in the comment field, but that has never been requested.

Examples of contributions intended for a specific use include:

- Masks for Pandemic Safe Singing, 2021
- Fleetwood-Jourdain Outreach, 2021, 2019
- Community Engagement, 2019
- Archives Funding, 2017
- Riser moving expenses, 2015
- Education Outreach, 2009
- Technology funding (website domain costs, ISP subscriptions, software costs, etc.), most not entered in CiviCRM

Requirements for handling future contributions intended to underwrite specific costs or events

Other than “getting the donation tagged in CiviCRM” there has been no communication of any requirements. Possible requirements might be:

- Enable multiple people to support the same specific event/fund
- Track how much money has been donated toward the specific event/fund, and who has contributed how much
- Enable a portion of a single contribution to be allocated for a designated use
- Not interfere with usual donation acknowledgment procedures, including ability for donation to be anonymous
- Allow a specific fund to span multiple NSCS seasons

Note: Since expenses are not entered into CiviCRM, CiviCRM cannot be used to manage the use of funds for a specific purpose.

Proposed Computer Services Recommendation

The most flexible and least disruptive solution is to establish additional ‘Organization’ Contacts and add them to the “NSCS Designated Use Funds” contact Group.

The NSCS Board or a designated Coordinator should determine the title used for each ‘organization’ and how specific the Fund is to be. For example, should gifts to the Fleetwood-Jourdain Outreach, Community Engagement, and Education Outreach be associated with the same Fund? Should one Fund be established for underwriting all concert-related expenses, or should a fund be specific to a concert or a season?

If a gift is to underwrite a specific cost within a more generic fund (e.g., “purchase rhythm instruments for Fleetwood-Jourdain use”), that could be documented in the donation comment field.

If the NSCS Board decides it would be helpful, previous designated contributions documented within CiviCRM by comments or a campaign could be updated to generate soft credits to the new funds.

A report of gifts given to any NSCS Designated Use Fund could be generated from CiviCRM upon request. Any monitoring of costs vs. funded amounts would be done outside of the CiviCRM application, using whatever tools the Treasurer and NSCS Board decide on.