CiviCRM MiniPrimer

CiviCRM is a database and software package that the North Shore Choral Society (NSCS) uses to manage data about the people and organizations that interact with the NSCS. In our context, CRM means "Contact Relationship Management." This document describes our primary uses of the data and functions provided by the package.

Contacts

The **Contact** is the most important concept in CiviCRM. Most of the Contacts in the NSCS database are **individuals**, but some are **organizations**. Most contacts are mailed the annual postcard/brochure describing our concert season.

Each NSCS member is an individual contact. Donations and ticket sales are recorded on an individual's record. Couples (non-members) on our mailing list are entered under one individual's name, but the Addressee and Donor Display Name fields can specify the name of more than one person for mailings and contribution acknowledgments.

The special funds (DCYAA, Larson, and Gockel) are defined in CiviCRM as organizations, as are corporations, media, other businesses, and governmental agencies that the NSCS interacts with. The NSCS itself is defined as an organization.

Contact Data: Personal Information

There can be multiple addresses, emails, and phones stored per **Contact,** one of which is designated as Primary.

CiviCRM also stores a contact's communication preferences for receiving mail, email, etc. When we want to combine mailings to individuals in the same household, but must have separate records for each (e.g. when each is an NSCS member), we mark one contact as "DO NOT MAIL." When an individual dies, we set the Is Deceased indicator and turn off communications, rather than deleting that person's record. This allows us to maintain referential integrity within the database.

Custom Data Fields (i.e., data fields NSCS has added) for Contacts

NSCS Patron Preferences: When a contact becomes a donor, we record a Donor Display Name used for donation acknowledgments. (For an individual donor, this often names multiple people; for an organization, it can specify a foundation or fund name.) If a contact wants all donations to be anonymous, we set this name to *Anonymous* and also set an Anonymous Donor indicator.

NSCS Member Data: When a contact is a member, we record voice part [as SATB and Divisi (*First*, *Second*)] as well as Height. We also record Member Display Name to specify how a

singer's name is shown in concert booklets. Another field (SATB sort) enables singers to be listed in traditional voice part order on reports.

Groups

Groups and Tags enable contacts to be organized and selected by queries and reports. Members are added to a group when they register for a new season. NSCS Board members are added to a group specific to that season. Donors are added to Patrons groups for each season. Ad hoc groups are created to respond to requests for database statistics.

Contributions

Because CiviCRM is designed for use by non-profits, all financial transactions are called contributions. The Financial Type field distinguishes these; we currently use *Donation*, *Donation of Stock*, *Donation via DAF* (Donor Advised Fund), *Corporate Gift*, and *Grant.* Since we do not use CiviCRM to keep the financial books, we do not create financial records for Event registrations (*Event Fees*) even though CiviCRM presents fields for recording these.

Soft Credits

NSCS uses the CiviCRM concept of a "soft credit" for a contribution in three different contexts:

- A *Special Fund* soft credit is used to allocate all or part of an individual's donation to one or more of the three NSCS special funds: DCYAA, Larson, and Gockel. This enables CiviCRM to report on gifts to these funds in the concert booklet.

- A *Household* soft credit is used to credit a single donation to multiple individuals who have separate records in CiviCRM. This enables reporting of Board member donations when the donation was recorded as given by the spouse of the Board member.

- A *Matched Gift* soft credit is used to acknowledge individuals who initiated a corporate gift through a matching gift program or other incentive program. The individual is given a zero dollar soft credit when the corporate gift is received. This is used for concert booklet acknowledgments.

Events

Event is another important concept in CiviCRM. Each NSCS season and concert is defined as a separate event; this allows a contact to be registered as a participant with a role of *Attendee* (and status of *Ticket purchaser*) of a season ticket or an individual concert ticket. We also register NSCS members as participants of concerts with the role of *Singer* so that we can track member participation in each concert.

Memberships

Membership records contain the information about an NSCS member's relationship to the NSCS. There are three <u>Membership Types</u>: Regular, Special, and Choral Scholar. (Special is for non-singing members.) A single membership record represents contiguous NSCS membership; if a member sits out for a season or longer, a new membership record is created, and the old record is retained as *expired*. The <u>Member Since</u> field always contains the date a contact first became a member.

Campaigns

The CiviCRM concept of a Campaign is used to group events into a concert season.

General CiviCRM Features

For most entries, CiviCRM allows notes or description fields to be recorded and stored, to document anomalies or special handling. We use these fields to explain decisions or actions at a detailed level.