CiviCRM Primer

CiviCRM is a database and software package that we will use to manage data about the people and organizations who interact with the NSCS. In our context, CRM means "Contact Relationship Management". This document will describe how NSCS will use 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**. Each NSCS member is an individual. Couples (non-members) on our mailing list are entered under one individual's name, but the Addressee and Donor Display Name fields will specify the name of more than one person. 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 per **Contact,** one of which is designated as Primary.

For each individual imported from dBase (the former NSCS database), the address was categorized as a *Home* address. When we have multiple home addresses for a contact, we can specify one as *Winter* and the other as *Summer*. The one marked primary is used for mailing lists. CiviCRM does not allow a Post Office Box to be added as a Street Address, since it generates GPS coordinates for locations. PO Box numbers can be added in a Supplemental Address field (there are two, which are included in CiviCRM-formatted mailing reports and files).

For each individual imported from dBase, the email was categorized as a *Personal* email. When we enter an email obtained from PayPal, we categorize it as a *Billing* email.

CiviCRM has two descriptors for each phone number: Location (*Home*, *Work*, *Other*, *Personal*) and Type (*Phone*, *Mobile*, *Fax*). (There are other choices available during data entry, but these are the only ones we use.) Since mobile phones don't have a fixed location, we use *Personal* for them.

dBase had three fields for phone numbers, named Home, Work, and Fax. The Work phone field was labelled as "Work/Cell Phone" on membership reports. The dBase Home Phone field was imported as *Home Phone*. For members, the Work phone was imported as *Other Phone*, since we didn't know if it was *Work* or *Mobile*. We change the designation of *Other* phone numbers based on member feedback.

CiviCRM also stores a contact's communication preferences for receiving mail, email, texts, bulk mailings, 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 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 program 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. We use tags to identify contacts who were sent patron appeal mailings.

When a ticket sale is recorded, the contact is added to a group for current season ticket purchasers. When data is exported for concert program booklet acknowledgments, Patrons are put in groups according to their accumulated donation totals. 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. 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. This includes event fees (ticket sales) and member dues as well as donations. 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 relating to Event registrations and Memberships (*Event Fee, Member Dues*) 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 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 program booklet. This is called a *Special Fund* soft credit.

- A 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. This is called a *Household* soft credit.

- A 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 called a *Matched Gift* soft credit, and is used in concert program 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. A **Priceset** is associated with each event to specify types (*Regular*, *Senior*, *Student*) of tickets and a cost for each type. Currently the only events established are of the Event Type *Performance*, but other types (e.g., *Fundraiser*, *Meeting*, *Workshop*) could be established.

Members are currently registered with a Role of *Singer* for each concert they participate in. Participants could be registered with other roles (e.g., *Instrumentalist*, *Soloist*, *Guest Conductor*) if that information was deemed appropriate for capturing in the database.

Memberships

Membership records contain the information about an NSCS member's relationship to the NSCS. There are three Membership Types: 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.

CiviCRM does not require an NSCS Board member to have a Membership record. NSCS Board membership is recorded by establishing a "Board Member of/Directed by" **Relationship** between an individual and the NSCS organization. The relationship has Start and End dates (usually Fiscal Year dates); the description field is used to identify a specific role (Music Director) or elected position (President). Additional Notes can be entered; for example, to explain changes of role/position within a term on the Board.

Campaigns

The concept of a Campaign is currently used to group events into a concert season (although CiviCRM developers intend for it to be used in the context of fundraising, one of their major functions).

Mailings

CiviMail functions are geared towards emails and SMS (text message) communications. We currently use these functions only for "member e-registration". This consists of sending an email to each of last season's members about the upcoming season, asking if they intend to participate, displaying data currently stored in the database for that member (via a "mailmerge" function), and requesting updates. Updates to member data are entered "manually" by Computer Services Team members.

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.

Other CiviCRM Functions

CiviCRM-delivered functions assume that most communications related to the organization (and therefore the database) will be electronic. This includes contribution processing, event registration, and membership renewal. Since NSCS is not using CiviCRM to track all financial transactions, these functions have not been implemented. For example, we record contributions "offline" (after the fact) and do not have CiviCRM send an automated thank you acknowledgment. (Our database is missing an email address for many NSCS patrons.)