



The purpose of this document is to describe the project team's decision on whether to implement household contacts, or just individuals and organizations in the CiviCRM database. The issue must be resolved (at least temporarily) before any importing any people into CiviCRM.

Since the focus of the initial implementation is to “replace what we have been doing with dBase” with CiviCRM functions, the first thing to analyze is what we are doing currently. (Other projects later may expand how NSCS uses CiviCRM.)

## Current Practices

### dBASE

The current dBASE system has a household implementation of a sort, in that multiple people may be recorded in the name/address fields of a single contact record. Multiple individual's names have been represented as:

1. A single LAST\_NAME and a single first name with a PREFIX field value representing a couple, such as Mr & Mrs, Dr & Mrs, etc.
2. A single LAST\_NAME but two first names in the FIRST\_NAME field, such as “James & Kathryn” or “Arnold and Florence”
3. A single LAST\_NAME and a single first name (optionally with a PREFIX field value representing one person, such as Mr, Mrs, Dr, etc.) but a second individual's (or a couple's) complete name in the ADDRESS\_2 field.
4. A single LAST\_NAME but two names in the FIRST\_NAME field, one of which is a name with a different surname, such as “Kevin Kemp & Diane”
5. A single LAST\_NAME and a single first name with a PREFIX field value representing a couple, such as Mr & Mrs, Dr & Mrs, etc. with yet a third person's name in the ADDRESS\_2 field (with or without a “c/o” designation)
6. A single LAST\_NAME but two first names in the FIRST\_NAME field, such as “Patrick & Eileen” with a third person named in the ADDRESS\_2 field (with or without a “c/o” designation)
7. Multiple names in the LAST\_NAME field (“Demaree & Wes Bucey”), but one in the FIRST\_NAME (“Susan”)

This messiness is as a result of the data not having been entered consistently in the various fields (LAST\_NAME, FIRST\_NAME, PREFIX, ADDRESS\_2). [Which field the data was entered in didn't matter if all you were thinking about was how a name appears on an envelope or mailing label.] During the data cleansing procedure we will manually analyze the records in the seven different cases above and restate them in a consistent manner (not a trivial task). The challenge is to determine what the consistent manner should be.

But when two members of the same household are NSCS members (e.g. Steve Warner, Anne Heider), there's a SYMPHONY.DBF record for each of them. One is marked as MAILING=FALSE so that when a mailing is sent out only the record that represents both of their names is selected by checking for MAILING=TRUE. (The NSCS member table has another set of name fields that are used for membership reports.) We will have to import Symphony records for all members, even though some of those records will be marked MAILING=FALSE.



### CiviCRM

CiviCRM has three types of contacts: Organization, Individual, and Household. These are mutually exclusive. Relationships can be establishing among contacts of the same or different types. One of the delivered relationships pertains to an individual's membership in a household.

There is a blog entry (<http://civicrm.org/blogs/eileen/households-%E2%80%93-bit-audit>) that has been useful in analyzing this issue. (Other CiviCRM users are also struggling with this.)

Here is the decision made for the NSCS implementation:

We will not create "household" records in CiviCRM. We will record the name of the individual we first hear about, and address postal mail to the household by modifying the Addressee field for that individual as required. Example:

Individual Last Name: Demaree

Individual First Name: Susan

Addressee: Susan Demaree and Wes Bucey

When two members of a household are NSCS members, we must have an individual record for each. In that case, one of the individual records will have both names in the Addressee field, and the other will be marked "Do not mail" via Communication Preferences.

If we want to be able to search and find Wes Bucey in the database, we will have to add him as an individual (but mark him "Do not mail") and link him to Susan's record. We will not do this unless/until we have a reason to do so (just receiving mailings is not enough of a reason.) This is consistent with the current dBase implementation, which will not find "Bucey" via a search using the Symphony form, even though Susan's SYMPHONY.DBF record has "Demaree and Wes Bucey" in the LAST\_NAME field.

The only circumstance where this implementation might not give us exactly what we need is if we intend to use the system to generate a mailing label/envelope to be addressed to only a member (and not the rest of the member's household). We will have to learn how to generate files for mailing labels using CiviCRM anyway, but we might have to use a custom function (rather than the out-of-the-box one) if we wanted to send a letter just to members. We would have this same problem with dBase, anyway.

We can revisit this decision later, but since it's extra work to create a household record (the correct way is to create multiple individual records and link each of them to the household record), and we are not sure of the benefit, we have decided that simple is better for now.