The purpose of this document is to describe how NSCS is currently using dBASE to record and report on member rehearsal attendance, so that we can decide what we must do for the initial implementation of CiviCRM. This includes entering rehearsal dates, generating attendance sheets, recording attendance, updating attendance data in the database, generating attendance reports, and sending attendance reports to specific NSCS Board Members/Coordinators.

Current Practices (as of 2014)

Computer Services (Ellen Pullin) updates dBASE components before the first rehearsal for each concert.

The Membership Coordinator (Emily Rivera) updates dBASE components and prints attendance sheets before each rehearsal. Emily gives these attendance sheets to the Section Leaders at rehearsal so that they can record the attendance of the singers in their section. Emily collects the sheets at the end of the rehearsal and updates the attendance data in dBASE. She shares attendance data with the Music Director upon request.

Upon request, Computer Services sends additional reports exported from dBASE to the Membership Coordinator, so that seating charts, labels for seating assignments, and CD order forms can be printed.

dBASE

The current dBASE system generates a printed report for entering attendance; one page is created for Soprano I, Soprano II, Alto I, Alto II, Tenor I & II, and Baritone/Bass. Members will show up on the attendance sheet only if dBASE has been updated to indicate that they are planning to sing the current concert. Each member records his/her concert participation plans on the season Registration form filled out in September. Concert participation information in dBASE is updated based on member/Section Leader feedback throughout the season.

The Attendance Sheet displays each singer's contact info (name, phone, email) plus the number of absences to date (for that concert – before the first rehearsal of a concert, Computer Services runs utilities to identify which field is used for member selection and to zero absence counts). There is a box to the left of the singer's name so that the Section Leader can mark which singers are at the rehearsal. The Attendance Sheet also displays a count of the number of singers in that section for the current concert. The header identifies the concert and the rehearsal date.

Reporting:

When he was Membership Chair, Anthony Green would send a weekly email to the Section Leaders, Music Director, General Manager, and several other Board members after he entered the attendance data for the current week's rehearsal. The report specified who was missing (by section), and listed the singer's email and how many absences each missing singer had, plus if that singer had paid dues for the season. The email itself also gave other info, such as if any singers had dropped out that week, and the current estimate of singers for the concert. Emily Rivera continued this for a while, but I think that the weekly email was discontinued in favor of Emily providing rehearsal attendance and concert participation info to the Music Director on request.

The above is my understanding of what we are currently doing (as of 2014).

CiviCRM

CiviCRM is set up to log participation in an Event by registering each Contact for the Event. The software enables online 'self-registration' by a Contact for a specific event via a front end site form. It also enables the establishment of an Event Fee and recording and acknowledging fee payments.

CiviCRM event fields

- Type
- Campaign
- Default Participant Role
- Title
- Dates (Start Date/Time and End Date/Time)
- Location
- Event Summary
- Complete Description
- Max Number of Participants (enables establishment of a "Wait List")
- Public Event indicator

There are additional fields for sharing the Event through social media, providing a map, and activating the Event. Configuration options include setting up fees, online registration, schedule reminders, "Tell a Friend" and personal campaign pages.

There are also separate fields and relationships (Campaign, Participant Role, Registration Date/Time, Participant Status, Event Source) which can be specified when establishing an Event Registration.

Design issue

The design issue to resolve and document here is whether delivered CiviCRM constructs, fields, relationships and reports are sufficient and/or appropriate for supporting rehearsal attendance data and reporting requirements in the initial CiviCRM implementation or in the foreseeable future.

NSCS custom data needed in CiviCRM

Fields used in dBASE for rehearsal attendance and reporting which are *not* delivered in CiviCRM are:
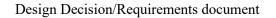
- Concert Participation
- Voice Part
- Height

This data is necessary for seating chart development and concert program booklet acknowledgement as well as rehearsal attendance. This information can be captured during the September season registration procedures and maintained throughout the season as necessary, as they are currently.

However, it seems more appropriate to register singers (Contacts who are members) for each concert (Event) than to set up a database field called 'Concert Participation' for each concert/singer combination. Each concert will have to be established as an Event to enable ticket sales anyway.

Design Considerations for using CiviCRM to track and report on rehearsal attendance

Registering singers as Event Participants for each concert will enable the database to provide a list of singers for seating chart development and for concert program booklet acknowledgement. The delivered CiviCRM fields of Participant Role and/or Participant Status (established during the Event Registration procedure) can be used to differentiate between Contacts who are ticket

purchasers/attendees for a concert and those who are singers. CiviCRM supports a separate type of Search (Find Participants) for facilitating lists and reports.

Data about Concert Participation by singers has value even after a concert/season is over. Music Librarians have asked Computer Services to determine whether current members participated in a past concert so that the likelihood of their already having musical scores can be determined.

However, it is less clear whether a Rehearsal should be established as a separate type of Event, and whether registering a member as a participant in a Rehearsal Event is an effective way to provide attendance tracking and reporting. This data is typically not queried after a concert is presented.

Establishing each rehearsal as a separate Event is not a trivial task. There is no delivered way of establishing a relationship between two Events, which we would want to do to select all Rehearsals for a given concert. It's unlikely that we could easily set up a procedure to add an event requiring just "front end" access, as opposed to full administrator rights.

Using the delivered online "Register Participant" function to record attendance has similar issues. It's much more involved than entering an X online, because both the Event and the Contact (member/singer) need to be selected via a search. It would be possible to use the "Import Participants" Wizard to enable a CSV file to load registration data, but there is overhead in setting up the import, creating the CSV file, entering the attendance data itself, running the job, and dealing with import errors.

There is also no easy way to calculate and store the number of absences for a given concert for each singer.

Considering that there seems to be no value in storing attendance data beyond a concert presentation, this is a lot of work on a weekly basis, and much of it would have to be done by the Computer Services Team.

Design Recommendation

Given the above considerations and the fact that the current Membership Chair (Emily Rivera) is comfortable with using Microsoft Excel, it seems more efficient to design a procedure which uses one or more spreadsheets for providing this functionality.

The NSCS has a Google account ("NSCS Members") which can be used to provide access via browser to files which hold concert participation and rehearsal attendance data. Storing these documents online provides for access by multiple authorized people. This simplifies transition of Membership Chair responsibilities to a successor, as well as access if the Membership Chair needs to delegate responsibilities on a temporary basis (due to vacation, illness, etc.) Using Google Drive and Google Sheets provides file access security, protection of file/cell contents (including formulas) from inadvertent modification, automatic saving, and backup/version restore capability. It is easy to include a separate "Instructions" tab in a Google Sheets file so that procedural Help info is easy to find.

To make data entry as efficient as possible, the Membership Chair should be authorized to enter/maintain Concert participation data as well as rehearsal attendance. As the concert approaches, concert participation data should be imported into CiviCRM to support other procedures (seating chart, concert program booklet acknowledgement) and for long term storage, but rehearsal attendance data does not need to be included in the CiviCRM database.