Detailed Project Requirements and Design/Configuration Choices

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DEVELOPMENT ENVIRONMENT:
Content Management System (CMS): Joomla! Version 2.5.17
Front End (public) Template: Joomlashack JS_Verdant Version 3.0
Contact/Constituent Relationship Management System (CRM):
        CiviCRM Version 4.4.3

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1. Document Purpose

The primary purpose of this document is to document the configuration selections that the Information Management Task Force will use in implementing CiviCRM for the North Shore Choral Society (NSCS).

2. Implementing/configuring data entry and display functions within CiviCRM

Data entry screens available in CiviCRM may need to be tailored to NSCS's needs, or new data entry forms developed. This includes configuring the following:
o   Dropdown Options for screens:
     Gender Options; Individual Prefixes (Ms, Mr…); Individual Suffixes (Jr, Sr…); Instant Messenger Services; Location Types (Home, Work…); Mobile Phone Providers; Phone Types; Website Types.

Potential NSCS Profiles
Profiles are used to aggregate groups of fields and include them as input forms, contact display pages, and search and listing features.
o   (Individual) Contact Display
o   (Organization) Contact Display
o   (Individual) New Contact Data Entry
o   (Organization) New Contact Data Entry
o   (Individual) View/Edit Contact Data
o   (Organization) View/Edit Contact Data
o   New Donation Data Entry
o   View/Edit Donation Data
o   Individual Donations by Category Report
o   Individual Donations by Fund Report
o   Individual Donations with Honor/Remembrance Roster data
o   New Ticket Purchase Data Entry
o   View/Edit Ticket Purchase Data
Potential needs for Iteration 2:
o   Membership List Display
o   Create New Membership
o   View/Edit Contact Membership Data
o   [Attendance-related data entry and reporting]

Potential NSCS Dashboards
o   Patron Coordinator
o   Membership Coordinator
o   Mailings Coordinator (assuming this existing position is expanded to include entering/updating mailing addresses based on USPS or constituent feedback)
o   Tickets Coordinator
o   Others? Will any Board members want to be able to access database info? Treasurer?

Assume we will not need a general "member" profile unless/until we enable members to update their own info or allow online registration.
Profile info on p.73 of *CiviCRM User Manual*
We will try to implement data entry functions in a "front end" environment, as opposed to keeping all data entry as "back end" (administrative) functions.

3. Defining tags within CiviCRM

Category Tags can be assigned to contacts and are convenient for searching. Each tag has a description to explain its meaning. New tags and tag sets can be created by NSCS. There are many different possible ways of using tags and type values. It's necessary to understand how CiviCRM uses them to determine which is best for NSCS.

Category Tags
o Delivered in "out of the box" CiviCRM:
  Non-profit; Company; Government Entity; Major Donor; Volunteer
o To be used by NSCS: *[proposed]* TBD
Comment: Tags are best used for high-level categorization of contacts and activities in the database.

Group Tags
o Delivered in "out of the box" CiviCRM: none
o To be used by NSCS: *[proposed]* Board of Directors, Coordinators, Section Leaders
Groups are used to segment the contacts in the database - most often for controlling access to data and facilitating specific organization tasks. Groups may be created to serve the needs of short-term projects and may also represent persistent segments of our constituent/contact base.

Smart Groups
o Delivered in "out of the box" CiviCRM: none
o To be used by NSCS: *[proposed]* Current Members, Recent Patrons, Recent Ticket Purchasers
Smart Groups allow contacts to be dynamically assigned to a group based on one or more characteristics and/or activities of those contacts. We can create a Smart Group for "Recent Patrons" - which identifies those "activity" of individuals making a donation during the past five years. When new individuals make a donation, they automatically appear in this group.

We may also be able to use "Smart Groups" to define our Patron categories: Principal Benefactors ($1000 or more since a given date), Guarantors ($500 to $999 since a given date), Sustaining Members ($250 to $499 since a given date), Patrons ($100 to $249 since a given date), Donors ($50 to $99 since a given date), Contributors (under $50 since a given date). However, since the amount calculation must take into account multiple donations, we might have to create a field to hold total donations.

Alternately, we may want to create one smart group for individuals whose donations were received during the period needed for our concert program booklet [Smart NSCS Patrons]. We could use advanced search criteria to select donations for these individuals above a certain amount and place those into the appropriate category manually, adjusting the category when the same contact gave multiple donations during the period.

4. Defining data types and other descriptors within CiviCRM

Valid "types" will be defined for use by NSCS. [NOTE: Some but not all of the delivered types are described here; some may not be relevant to this project's scope.]

Contact Types
Comment: dBase already uses a Household concept.
o Delivered "built-in" to CiviCRM: Household; Individual; Organization
o To be used by NSCS: **Individual**; **Organization**
  Design decision made in August, 2013: 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. 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 <u>Addressee</u> field, and the other will be marked "Do not mail" via Communication Preferences.

Financial Types
o   Delivered in "out of the box" CiviCRM:
    Campaign Contribution; Donation; Event Fee; Member Dues
o   To be used by NSCS: [*proposed*] **Donation; Corporate Gift; Event Fee; Member Dues**
Comment: We may want to expand this in the future to include Program Ad fees. Currently advertisers per se are not entered into the NSCS database. This was named "Contribution Type" in a previous version of CiviCRM.

Member Types
o   Delivered in "out of the box" CiviCRM: None
o   To be used by NSCS: *[proposed for iteration 2]* **Regular; Choral Scholar; Special**
    Special is for non-singing members: no dues. Julia Davids, Sharon Peterson. Bill Stribling could also be a "Special" member. Currently there is a "Membership List" flag in the NSCS database to identify people who should be included on the Membership List even though they have not paid dues and are not identified as singing for any concert during the current season.
Comment: We might want to consider a "Staff" membership if a contact can hold multiple memberships at the same time.
o   Regular (usually singer) pays regular dues. Membership term = 1 year. (September thru August?) Doesn't necessarily have to sing in any concerts. Included on member list in concert program booklets. Included on NSCS Membership list.
o   Choral Scholar (singer) has dues waived. Membership term = 1 year. Included on member list in concert program booklets. Included on NSCS Membership list.
o   Staff is paid by the Society. [Music Director, General Manager, Accompanist] Membership does not have a specified end date. Included on NSCS Membership list. (General Manager is also a Regular member? A contact can have more than one membership.)
o   Special (not a singer) doesn't pay dues. Membership does not have a specified end date. Used to include people on NSCS Membership list who are not one of other membership types (e.g. Bill Stribling). Could also be used for external Board members?

Relationship Types
o   Delivered in "out of the box" CiviCRM:
    [not complete] Employee of; Head of Household for; Household Member of; Spouse of; Supervised by; Volunteer for
o   To be used by NSCS: *[proposed]* **Employee of; Spouse/Partner of; Volunteer for**

Activity Types
o   Delivered in "out of the box" CiviCRM:
    Many; most are "reserved" (cannot be disabled even if we are not using the applicable component.)
o   To be used by NSCS: *[proposed]* All activity types that are not "reserved" will be disabled. (We are not sure how we will be using activities yet.)
Design Question for Iteration 2: Is a Rehearsal an "Event Type" or an "Activity Type"?
Rehearsal - A rehearsal is scheduled to relate to one or more performances (Performances will probably be defined as Events). Members attend rehearsals. Rehearsals may also be attended by other musicians. Rehearsal agendas are usually planned ahead of time. A location and time are also set. [Because of the definition, if this is an activity perhaps it should be defined at the Contact component level, not just in the CiviMember context.]

Event Types
o   Delivered in "out of the box" CiviCRM:
    Conference; Exhibition; Fundraiser; Meeting; Performance; Workshop
o   To be used by NSCS: *[proposed]* **Performance; Workshop; Fundraiser; Meeting**
Comment: It is likely that only Performance will be used initially. (We will record ticket sales because we add people who buy tickets to our mailing list.)
Considerations for future projects:
o   Can "communicate with event participants via email before and after the event" [Rehearsal plan before? Notice of recording available online after Report of attendees afterwards?] The event summary and complete description could be important general information (Sectional, men downstairs, women upstairs) and specific info (list of pieces to be rehearsed), respectively.
o   Use "Mass Registration" p.157 to establish "pending" registrations for people singing the concert?
o   A concert seems like it would be an event (close to delivered example of "Performance"). "Maximum number of participants" might be helpful for stopping ticket sales if we reach venue capacity. (Although we wouldn't get into such functions unless/until we integrate CiviCRM with our production website and ticket sales.) Should a singer in the concert be considered as another role (in addition to audience member) so that it's easy to keep track of who's singing?

Campaign Types
o   Delivered in "out of the box" CiviCRM:
    Direct Mail; Referral Program; Constituent Engagement
o   To be used by NSCS: *[proposed]* None: defer this
Comment: CiviCampaign is used to link activity such as donations, mailings and events to a particular campaign. A Patron mailing could be considered a campaign. However, we currently have no way of knowing if a donation is tied to a mailing. We may want to use Campaign to identify the various funds (DCYAA, Larson, Gockel) that a patron can donate to, since CiviCRM already allows a donation to be associated with a Campaign.

Other valid "descriptors" can be defined for use by NSCS.

Campaign Status
o   Delivered in "out of the box" CiviCRM:
    Planned; In Progress; Completed; Cancelled
o   To be used by NSCS: *[proposed]* None: defer this with Campaign Type
If we decide to use Campaign to identify our various funds (DCYAA, Larson, Gockel), we will probably use Active as opposed to "In Progress".

5. Implementing/configuring reporting and output functions within CiviCRM

Reports available in CiviCRM may need to be tailored to NSCS's needs, or new reports developed. Also results of searches can be formatted into mailing labels.

Label Formats
o   Delivered in "out of the box" CiviCRM:
    Avery 3475; Avery 5160; … Avery 8600; … Avery L7163
o   To be used by NSCS: *[proposed]* TBD

Print Page (PDF) Formats
- o Delivered in "out of the box" CiviCRM: None
- o To be used by NSCS: *[proposed] TBD*

Postal Greeting Options
- o Delivered in "out of the box" CiviCRM:
  [5: Delivered fault is "Dear {contact.first_name}"]
- o To be used by NSCS: *[proposed] TBD*