



## Mailing List Activities – Planning and Management

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### ACTIVITY OUTPUT:

These activities will produce:

1. A file that a mailing service can use to address NSCS 2013-2014 Season Brochures
2. Documented selection criteria for season brochure mailings
3. First cut of name/address data entry standards
4. Cleansed data for importing into CiviCRM

### ACTIVITY INPUT:

Data from NSCS01 dBASE tables  
Data from "Lifetime of Singing" workshop registrations  
Guidance/Direction from appropriate NSCS Board Members/Coordinators

### PREREQUISITES:

*What do we need before we can get started?*

### DEPENDENCIES:

*What do we need before we can produce our deliverables?*

### ASSUMPTIONS:

- These activities can be performed independently of installing, configuring, and using CiviCRM.
- We can find NSCS members who will help in data cleansing.

### Document Information

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Ellen Pullin	1.0	04/11/2013	Initial draft created for team review



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## 1. Document Purpose

The purpose of this document is to document how the Information Management Task Force will address creating the name/address file needed for the mailing service to address and barcode the NSCS 2013-2014 Season Brochures. Eventually creation of this file will be done via CiviCRM functions. But the file (which usually has around 2600-2700 names/addresses) needs to be ready in July 2013.

## 2. Options considered for file creation

### 2.1. *Create the file from dBase on NSCS01*

We could modify the dBase queries that Anthony used in 2012 to create the file.

### 2.2. *Use data exported from dBase, subsequently cleansed*

We will want to clean up data before importing it into CiviCRM; we could export this data, perform cleanup activities (correct errors, ensure data fields are used consistently), and create the file before using the cleansed data to import into CiviCRM.

### 2.3. *Import data into CiviCRM and then create the file*

This approach requires the data cleansing activities above, in addition to some initial configuration of CiviCRM.

## 3. Selected Option for file creation

We selected which option, and why. Steps for selected option

### 3.1. *Export data from dBase on NSCS01*

The dBase queries that Anthony used in 2012 to create the mailing service file were updated and a first cut file produced on 03/15/2013. This file contained 2704 entries.

### 3.2. *Cleanse data and apply standards*

Involve multiple NSCS members, ask each to look at 100 or so names/addresses so that this step doesn't take forever?

### 3.3. *Create file*

Find out what service will do the mailing to verify file requirements.

## 4. Data selection criteria for brochure mailing

Need to document. Who is responsible for setting the criteria? Do we send brochures to individuals, or also to organizations? If organizations, do we specify only positions as the addressee?

## 5. Mailing List maintenance responsibility

Who should be trained to use CiviCRM to do data entry/maintenance for the mailing list? Who should be responsible for entering the criteria for mailing file creation, creating the needed output file, and delivering it to the mailing service? These are "end user" responsibilities, not technical responsibilities of Computer Services. NOTE: If the Task Force creates the mail



service file for the 2013-2014 brochures, this does not have to be determined by the July 2013 deadline.

### **5.1. *Multiple Coordinators Authorized***

Name Address data entered/updated/selected in the context of Members, Patrons, and Ticket procedures.

### **5.2. *One Coordinator Authorized?***

### **5.3. *Task Force provide data entry until Coordinators identified?***

## **6. Training NSCS Coordinators in using the new system**

If CiviCRM is to be used for the file creation...

### **6.1. *Data Entry***

Contact data for individuals, households, and organizations; and donation data

### **6.2. *Mailing labels and mail service files***

Ability to create mailing labels and files for USPS bulk mailings

## **7. Milestones**

The following outlines milestones of the project:

### **7.1. *People assigned to these activities***

description

### **7.2. *Finalizing plan for completing these activities***

How shall we do this?

### **7.3. *Selection criteria for file set***

Something different than what we have been doing?

### **7.4. *Data meeting criteria exported from NSCS01***

In a format that could be used for importing into CiviCRM after cleansing?

### **7.5. *Data cleansing completed***

This activity could involve multiple NSCS members.

### **7.6. *File created and delivered to the mailing service***

Should be done by early July, 2013.