



Project Status Report

Project Name: Information Management Task Force: CiviCRM Implementation

Date: 7/29/2015

Status Summary: The Information Management Task Force has imported almost 2700 records into CiviCRM from dBase and has stopped using dBase for everything except member-related functions (e.g. rehearsal attendance recording and reporting).

Accomplishments in the past month

Patron Thank You Letter: Outgoing Patrons Coordinator Steve Warner worked with Ellen Pullin to develop a Microsoft Word version of the Patron Thank You mail-merge document. The new document uses a file exported from CiviCRM containing donation data. The export file is in comma-separated values (.csv) format. Steve successfully printed letters and shared the files with his successors.

Training: Ellen Pullin trained team members Dan Woodard and Jim Miller in entering contact and contribution data into CiviCRM. Computer Services CiviCRM procedure documentation was published on the Relationship Management website. Dan will enter donations, donations via donor-advised funds, and corporate gifts into CiviCRM only from now on.

Patron information for concert program booklets and mailing labels for patron appeal letters will be generated only from CiviCRM.

dBase contact data import: Before this month, 296 contacts had been imported from dBase, including all donors for the past five years. Identifying specific targets to import in batches took almost as much time as doing the data cleanup and import. So a new strategy was implemented to identify all people on the season mailing list (~3000), perform data cleanup, and import them in batches depending on import mapping requirements. Best practice research revealed that importing more than 300 contacts at a time is not advisable. The "mass import" was done in 22 batches, including several which required special handling.

Mailing list for season postcard: The mailing list file (.csv format) for the August 2015 postcard mailing was created from CiviCRM and the results reconciled to a comparable file exported from dBase. The file was sent to NSCS Board members so that they could review it and identify potential records which should be consolidated and/or eliminated from the mailing.

Membership data: Member and membership data (voice part, height, dues and concert participation fields from the NSCS.dbf table in dBase) were imported into CiviCRM for the 268 individuals who have been members at some time since 2009. CiviReport was used to create the NSCS Membership List. A CiviCRM contact "group" was created and stored to identify those on last season's membership list.

Membership e-Registration: Computer Services worked with the Membership Coordinator (Emily Rivera) to develop a template enabling e-registration for the 2015-2016 season. The CiviMail application will be used to send individualized emails to last year's members, asking each about participation in the upcoming season and requesting that each verifies his/her own contact and member data stored in CiviCRM.

Items Requiring Board Input

Upgrade of Joomla! (website content management software) on the NSCS Relationship Management (nscscrm) and production (northshorechoral.org) websites.

- **End Goal:** Upgrade the software to version 3.4. Support for the version (2.5.27) used on both our websites was discontinued as of December, 2014.
- **Immediate need:** Update to the supported version on nscscrm before we become dependent on the environment for board/coordinator operations. Determine whether it makes sense to pay to have this done.

Future Steps

When the Membership Coordinator requests, send out the membership e-registration emails. Record season participation and member contact data changes in CiviCRM from the responses. (Emily will make the corresponding changes in dBase.)

Create Computer Services CiviCRM procedure documentation for generating patron-related output files and reports and publish on the Relationship Management website. This includes patron information for concert program booklets and mailing labels for patron appeal letters as well as generating files for patron thank you letters.

Determine how dBase ticket sales data should be imported and stored in CiviCRM. (Contacts who bought tickets during the past five years should be included in this fall's patron appeal mailing.) Complete the import.

Document CiviCRM data entry procedures for ticket sales and publish on the Relationship Management website.

Determine how to address the need for member rehearsal attendance recording and reporting.

