



Project, Requirements, and Scope Management

DATE: 02/01/2013
PREPARED BY: Ellen Pullin

PAGE: 1

DEVELOPMENT APPROACHES AND METHODOLOGIES:

This project will use a simple methodology with the following phases:

1. Initiation/Planning
2. Requirements
3. Design
4. Build and/or Configuration
5. Test
6. Implementation

There will be two iterations of the phases, one to address contact data (mailing list) administration and Patrons Coordinator functions (including donation data entry and reporting), and a second iteration to address Membership Coordinator functions.

DEVELOPMENT ENVIRONMENT:

Content Management System (CMS): Joomla! Version 2.5.8
 Front End (public) Template: Joomla!shack JS_Verdant Version 3.0
 Contact/Constituent Relationship Management System (CRM):
 CiviCRM Version 4.2.6.

PLATFORMS TO BE USED:

Data and functions to be migrated from a database (Visual dBase) and associated software components which is resident on one laptop (Microsoft XP OS) but accessible remotely, one user at a time, via one LogMeIn Ignition account with a shared login ID.

Data and functions to be migrated to a database (MySQL) and associated software hosted on the internet (**ANS Hosting**), accessible by multiple users concurrently via web browser with secure, **encrypted** individual logins.

ACCEPTANCE TESTING PROCESS:

The NSCS volunteers who will use the new system as part of their jobs will be involved in testing. The project team will request that policy decisions and approval of project scope and deliverables be made by appropriate representatives of the NSCS Board.

OVERALL CHANGE CONTROL APPROACH:

This document will be the primary source of project documentation; significant updates will be identified with a new version number and routed to team members and our Board Liaison for communication and consensus.

Document Information			
Title:	New Database Task Force Project Document		
Identifier:	New Database Task Force Project.docx		
Status:	Draft		
Comments:			
Version History			
Author	Version	Date	Description
Ellen Pullin	1.0	02/01/2013	Initial draft created for team review



Table of Contents

1.	Document Purpose	3
2.	Task Force Purpose.....	3
	2.1. <i>Background</i>	3
	2.2. <i>2012 IT Task Force</i>	3
	2.3. <i>New Database Task Force</i>	3
3.	Task Force Staffing.....	3
4.	Requirements.....	4
	4.1. <i>Importing data from the current dBase tables stored on NSCS01</i>	4
	4.2. <i>Implementing/configuring display options within CiviCRM</i>	4
	4.3. <i>Implementing/configuring data entry and display functions within CiviCRM</i>	5
	4.4. <i>Defining data types, tags, and other descriptors within CiviCRM</i>	5
	4.5. <i>Implementing/configuring reporting and output functions within CiviCRM</i>	6
	4.6. <i>Training NSCS Coordinators in using the new system</i>	6
	4.7. <i>Determining what kind of hosting environment is needed</i>	6
5.	Initial Functional Scope.....	6
	5.1. <i>Data Entry</i>	7
	5.2. <i>Patron/Donation Reports</i>	7
	5.3. <i>Mailing labels and mail service files</i>	7
6.	Iteration 2 Functional Scope	7
	6.1. <i>Data Entry</i>	7
	6.2. <i>Regular Membership Reports</i>	7
	6.3. <i>Ad hoc reports</i>	7
7.	Out of Scope Declarations	7
	7.1. <i>Creating Job Descriptions for Board members and Coordinators</i>	7
	7.2. <i>Creation of a Comprehensive Information Management Policy</i>	7
	7.3. <i>Implementing use of mass emails or enabling online donations</i>	7
	7.4. <i>Integrating the current production NSCS website with CRM functions</i>	8
	7.5. <i>Creating comprehensive detailed procedure documentation</i>	8
8.	Assumptions	8
	8.1. <i>Documentation requirements</i>	8
	8.2. <i>Computer Services Coordinator role</i>	8
	8.3. <i>New Coordinator positions</i>	8
	8.4. <i>Succession planning and job rotation</i>	8
	8.5. <i>Minimizing tailoring and unique terminology</i>	8
	8.6. <i>Individual accountability</i>	8
9.	Milestones.....	9
	9.1. <i>LTS version of Content Management System (CMS) installed</i>	9
	9.2. <i>CiviCRM installed</i>	9
	9.3. <i>First batch of dBase data imported into CiviCRM successfully</i>	9
	9.4. <i>Goal for July 1, 2013:</i>	9
	9.5. <i>Goal for September 1, 2013:</i>	9
10.	Additional Documentation.....	9
	10.1. <i>North Shore Choral Society IT Task Force status as of September 1, 2012</i>	9
	10.2. <i>Evanston Community Foundation Grant Request January 28, 2013</i>	9



1. Document Purpose

The primary purpose of this document is to define specific measurable objectives of the New Database Task Force that was formed in January, 2013. It will be the primary repository of project planning and requirements documentation. Separate files pertaining to this project will be listed in the Additional Documentation portion of this document.

Achievement of the measurable objectives will demonstrate that the goals of the Task Force have been met and that the NSCS Board can disband the Task Force.

2. Task Force Purpose

2.1. Background

Prior to the start of the 2012-2013 season, Anthony Green was the sole provider of Computer Services for the Choral Society. Using Visual dBase on his personal computer, he maintained contact data for members, patrons (those who support the Choral Society with monetary donations), concert ticket purchasers, and those on our brochure mailing list. He also recorded donations and concert ticket orders received via our Post Office box, phone calls, and our website, and created output reports and files used by other NSCS Board members and committee chairs. When Anthony expressed his desire to retire from this volunteer activity, an IT Task Force was formed to enable him to do so.

2.2. 2012 IT Task Force

The 2012 IT Task Force completed its goal to transition away from the "single person" system by distributing Anthony's responsibilities for data entry and reporting to multiple Coordinator positions. The Membership Coordinator is now responsible for maintaining member data and creating reports for rehearsal attendance and concert participation. The Patrons Coordinator now prints patron "thank you" letters and creates files used to acknowledge donations in our concert program booklets. The remainder of the data maintenance tasks, plus more technical activities (e.g. dBase component updates) have been assumed by the Computer Services Coordinator and several assistants. The dBase components are now accessible remotely via the internet (although only by one person at a time), and are automatically backed up so that we will be able to recover from problems with the technology.

At its December, 2012 meeting, the NSCS Board accepted the work of the 2012 IT Task Force with thanks and agreed to disband the group.

2.3. New Database Task Force

However, the Board realized that NSCS must now move to the next phase -- an improved database architecture. The New Database Task Force was formed to implement a new database and supporting browser-based functions that will enable management of member, mailing list, patron, and donation data. Research of available database/application packages seems to indicate that CiviCRM, an open source product, would meet our current needs and has many additional capabilities that the NSCS might want to implement in the future.

Simply stated, the scope of this project/task force is to replace "what we have been doing with dBase" with CiviCRM functions.

3. Task Force Staffing

Ellen Pullin has agreed to lead the task force. Jim Miller, John Zhang, Renata Lowe, and Karen Rigotti are task force members. There may be discrete activities (e.g., setting data



policies and standards, reviewing name and address data before it is imported into the new database, testing CRM functions) that will require additional NSCS volunteers from time to time. John Zhang has agreed to continue to participate, even though he is leaving the area and will not continue to sing with the Choral Society.

4. Requirements

As delivered, CiviCRM includes the following components:

- CiviContribute: Online fundraising and donor management, as well as offline contribution processing and tracking.
- CiviPledge: Accept and track pledges (for recurring gifts).
- CiviEvent: Online event registration and participant tracking.
- CiviMember: Online signup and membership management.
- CiviMail: Personalized email blasts and newsletters.
- CiviCampaign: Link together events, mailings, activities, and contributions. Create surveys and online petitions.
- CiviCase: Integrated case management for human service providers.
- CiviGrant: Distribute funds to others, for example foundations, grant givers, etc.

This project will involve enabling and configuring those components needed to support the functions described within the functional scope sections of this document. Project activities will include:

4.1. *Importing data from the current dBase tables stored on NSCS01*

This project will include many activities related to the data currently contained in the dBase tables stored on the NSCS01 computer, a laptop currently located in Ellen Pullin's home and connected to the internet. These activities include:

- Determining what data needs to be imported
- Mapping dBase data fields to existing CiviCRM data fields
- Creating custom NSCS data fields within CiviCRM to handle dBase fields which don't have a counterpart in the "out of the box" CiviCRM
- Evaluating the data quality of the current data within dBase
- Performing "data scrubbing" to enable data to be imported into CiviCRM consistently
- Setting standards for data entry and maintenance
- Determining what to do with data fields or records in dBase that will not be imported because they are no longer relevant

Data quality will be a major concern of this project. Data quality is defined here as the degree to which information consistently meets the requirements and expectations of those that use it. In our integrated data environment, data quality is *not* defined as fitness for a single purpose – it is defined as fitness for *all* purposes made of the data, including likely future uses. Data quality issues include issues of both content quality (the degree to which data values accurately represent real world entities or facts) and presentation quality (conformance to data standards and format requirements).

4.2. *Implementing/configuring display options within CiviCRM*

This includes configuring the following:

- Dashboards
- Display Preferences
- Search Preferences
- Navigation Menu
- Word Replacements
- Custom Search Management



4.3. 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:

- 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.
- Profiles (used to aggregate groups of fields and include them as input forms, contact display pages, and search and listing features.)

4.4. Defining data types, tags, and other descriptors 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**

- Delivered in "out of the box" CiviCRM:
 - Non-profit; Company; Government Entity; Major Donor; Volunteer
- To be used by NSCS: *[proposed]* TBD

Also, 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. Those not to be enabled will be removed from this document.]

○ **Contact Types**

Comment: dBase already uses a Household concept.

- Delivered "built-in" to CiviCRM: Household; Individual; Organization
- To be used by NSCS: *[proposed]* Household; Individual; Organization

○ **Contribution Types**

- Delivered in "out of the box" CiviCRM:
 - Campaign Contribution; Donation; Event Fee; Member Dues
- To be used by NSCS: *[proposed]*
 - Donation; Grant; Matching Gift; Member Dues

○ **Member Types**

- Delivered in "out of the box" CiviCRM: None
- To be used by NSCS: *[proposed]* Singer; Choral Scholar

○ **Relationship Types**

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

○ **Activity Types**

- Delivered in "out of the box" CiviCRM:
 - to be entered*
- To be used by NSCS: *[proposed]* TBD

○ **Event Types**

- Delivered in "out of the box" CiviCRM:
 - Conference; Exhibition; Fundraiser; Meeting; Performance; Workshop
- To be used by NSCS: *[proposed]* TBD

○ **Campaign Types**

- Delivered in "out of the box" CiviCRM:
 - Direct Mail; Referral Program; Constituent Engagement
- To be used by NSCS: *[proposed]* TBD



- **Grant Types**
 - Delivered in “out of the box” CiviCRM: Emergency; Family Support; General Protection; Impunity
 - To be used by NSCS: *[proposed]* None
 - **Survey Types**
 - Delivered in “out of the box” CiviCRM: Survey; Canvass; PhoneBank; WalkList; Petition Signature
 - To be used by NSCS: *[proposed]* None
- Other valid “descriptors” can be defined for use by NSCS.
- **Campaign Status**
 - Delivered in “out of the box” CiviCRM: Planned; In Progress; Completed; Cancelled
 - To be used by NSCS: *[proposed]* TBD

4.5. 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**
 - Delivered in “out of the box” CiviCRM: Avery 3475; Avery 5160; ... Avery 8600; ... Avery L7163
 - To be used by NSCS: *[proposed]* TBD
- **Print Page (PDF) Formats**
 - Delivered in “out of the box” CiviCRM: None
 - To be used by NSCS: *[proposed]* TBD
- **Postal Greeting Options**
 - Delivered in “out of the box” CiviCRM: [5: Delivered fault is “Dear {contact.first_name}”]
 - To be used by NSCS: *[proposed]* TBD

4.6. Training NSCS Coordinators in using the new system

NSCS Coordinators, specifically the Patrons Coordinator and the Membership Coordinator, will be authorized to access appropriate functions within the new system and will be trained on new procedures for performing the activities they are responsible for. The Computer Services Coordinator and assistants will also be trained in ongoing maintenance functions. The Task Force members will also train any other Coordinators or volunteers who may also be involved with the new system on a temporary or ongoing basis.

4.7. Determining what kind of hosting environment is needed

Hosting and technical support needs may change because this architecture calls for storing personal and financial information on a host and having multiple users able to access this data concurrently via the internet.

5. Initial Functional Scope

This section and the one that follows ([Iteration 2 Functional Scope](#)) describe the data and services which are considered to be within the scope of the New Database Taskforce project.

The first iteration will include functions to support the Patrons Coordinator and maintenance of data for the people and organizations on our mailing lists. (We currently use dBase to create bulk mail files to send out our season brochure, and to print mailing labels for patron appeal mailings.)



5.1. Data Entry

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

5.2. Patron/Donation Reports

Thank you letters and information needed to acknowledge donations in our concert program booklets

5.3. Mailing labels and mail service files

Ability to create mailing labels and files for USPS bulk mailings

6. Iteration 2 Functional Scope

Functions to support the Membership Coordinator

6.1. Data Entry

Data specific to membership, dues, concert participation, rehearsal attendance, volunteer expertise

6.2. Regular Membership Reports

Concert participation, weekly attendance, member info to help determine concert standing formation

6.3. Ad hoc reports

Ability to create one-time only reports

7. Out of Scope Declarations

The following topics are out of scope for this task force:

7.1. Creating Job Descriptions for Board members and Coordinators

This project may change the way Coordinators and/or Board members do their jobs, and may also identify the need to either create new Coordinator positions or to add responsibilities to current Coordinator positions. However, the task force will not create By-Laws updates or job descriptions.

7.2. Creation of a Comprehensive Information Management Policy

While recognizing that the NSCS needs to develop a comprehensive Information Management Policy that covers data collection, use of data, and privacy issues, such a policy is not a deliverable of this project.

7.3. Implementing use of mass emails or enabling online donations

CiviCRM has many features that the NSCS may want to take advantage of at some point. These include the ability to generate and send emails to the contacts contained in its database.

Also, CiviCRM describes how NSCS currently records donations as "offline contribution processing and tracking." CiviCRM enables donor management and "online fundraising" which automatically generates contribution records.

NSCS may want to pursue use of these capabilities at some point, but they (and other CiviCRM delivered functions not currently performed using dBase) are out of scope for this project.



7.4. Integrating the current production NSCS website with CRM functions

The current North Shore Choral Society production website (www.northshorechoral.org) also uses Joomla! 2.5.8 and could be integrated with the environment in which CiviCRM is installed (www.northshorechoral.org/nscscrm). It may our long-term direction to do so. However, that is outside the scope of this project.

7.5. Creating comprehensive detailed procedure documentation

While this project includes training, it does not encompass creating procedure documentation or job flows that show how information is shared between people in different Coordinator, Board member, or volunteer positions.

8. Assumptions

The following outlines assumptions of the project:

8.1. Documentation requirements

It's more important to implement than to document, but we need to have a reference for future projects. We want to minimize the number of different documents we create. This document will be the major source of information about planning and implementation. We will update this document throughout the project, taking snapshots at various points/milestones and storing the snapshots in a repository accessible via the nscscrm website.

8.2. Computer Services Coordinator role

The Task Force assumes the NSCS Board is in general agreement that in the long term the Computer Services role is a "behind the scenes" one – performing system/design changes or creating interim files, rather than performing data entry tasks or creating final output such as membership reports, patron Thank You letters, or mailing labels. Training materials will be created based on this assumption.

In terms of CiviCRM, on an ongoing basis, Computer Services will develop/configure any additional reports needed, implement, and establish/maintain users and permissions.

Computer Services will be involved in implementing new functions using CiviCRM, but such activities will require a new task force and an iteration of the development methodology similar to the one used for this project.

8.3. New Coordinator positions

May be needed

8.4. Succession planning and job rotation

The Task Force assumes that NSCS should avoid dependence on the same people doing the same jobs year after year. We assume that training in use of CiviCRM will be an ongoing Computer Services responsibility.

8.5. Minimizing tailoring and unique terminology

The default approach to how to do something will be generally accepted methods and procedures. We should minimize the tailoring of CiviCRM, and use standard terminology whenever possible.

8.6. Individual accountability

Because we are dealing with financial and personal information, we need to track who is able to enter/change data. This requires that individuals be uniquely identified via username when logging into CiviCRM, as opposed to using a generic member ID, such as is currently allowed with the production NSCS website. Roles (aka user groups) will



be established so that individuals accessing CiviCRM will be able to perform specific functions based on their responsibilities. The number of “super users” will be limited.

9. Milestones

The following outlines milestones of the project:

9.1. ***LTS version of Content Management System (CMS) installed***

The most current Long Term Support version of Joomla! (2.5.8) was installed in the northshorechoral.org/nscscrm environment on 11/25/2012.

9.2. ***CiviCRM installed***

CiviCRM version 4.2.6 was installed in the northshorechoral.org/nscscrm environment on 11/26/2012.

9.3. ***First batch of dBase data imported into CiviCRM successfully***

Contact data for organizations who gave the NSCS grants or matching gifts in 2012 was successfully imported using the CiviCRM import function on 1/14/2013.

9.4. ***Goal for July 1, 2013:***

Mailing service files generated from CiviCRM for mailing of the 2013-2014 season brochure

9.5. ***Goal for September 1, 2013:***

Patrons Coordinator trained in using CiviCRM for contact and donation data entry.

10. Additional Documentation

The following are additional documents used to explain, manage, and report on this project:

10.1. ***North Shore Choral Society IT Task Force status as of September 1, 2012***

This PowerPoint presentation was presented to the NSCS Board on September 8, 2012 to explain the changes being implemented to migrate the NSCS master database from Anthony Green's personal computer, and the separation of “end user” tasks from “computer services” tasks. File name: “Board presentation 9-2012.pdf”

10.2. ***Evanston Community Foundation Grant Request January 28, 2013***

The NSCS submitted an ECF grant application to fund anticipated fees associated with this project. The forms submitted described various aspects of the project. Project-related file names: “561North Sh-212503.pdf”, “NSCS_ECF_2013ProjectBudget.xls”

[These documents should be added to the nscscrm website.]