MEMBER MANAGEMENT WITH CIVICRM

Canadian Ski Patrol (CSP)

1 OVERVIEW

1.1 ABOUT THE CANADIAN SKI PATROL (CSP)

"The Canadian Ski Patrol is comprised of more than 4,500 volunteers from coast to coast to coast in Canada in 56 zones and nine divisions. [...] Non-profit charitable organization. The vast majority of CSP members volunteer their time for the services they deliver. A number also become paid patrollers at ski resorts across Canada."

- Website: https://www.skipatrol.ca
- Current CMS: WordPress
- Current CRM: In-house PHP application developed by professionals who volunteered their time internally.

1.2 ABOUT THE SERVICE PROVIDER

Coop SymbioTIC is a worker co-operative. Each of us has several years of experience in free software and the team has expertise in :

- contact management with CiviCRM (membership, fundraising, e-mailing, events),
- content management with Drupal and WordPress,
- system administration with Linux (networking, performance, security).

Our mission is to help local organization simplify their internal activities by :

- offering light and accessible turn-key solutions, adapted to their reality and based primarily on free software;
- pooling their similar needs supporting their internal processes;
- maintaining a listening relationship with them;
- offering support and resources to address their concerns.

We are an "empowering" partner and contributor to CiviCRM. We are deeply engaged in the development and sustainability of the project.

2 SPECIFICATIONS

2.1 GENERAL DESIGN PRINCIPLES

- Provide a modern, easy to use CRM, that can scale to the needs of a national organisation

- Mobile-friendly access
- Bilingual forms/portal
- Keep/improve self-service member portal functionality
- Access restrictions by region (ex: staff from Quebec should only see contacts from Quebec)
- Access restrictions by type of data (ex: certain role of staff can only view/update some specific types of information)

2.2 REQUIREMENTS

In order of priority:

- Member management (tracking contact information, memberships, renewals and payments).
- Member search (phone book, with access levels).
- Online registration and payment
- Reporting
- Single-sign-on integration with other CSP tools (access to first-aid manual, other member-only portal features, SSO to Moodle).
- Event registration (internal conferences/events, national and regional)
- Donation management and charitable tax receipts
- Email communications with members and other types of supporters
- Contact engagement automation (ex: potential member submits a form to signal their interest, local rep contacts the person, begins the membership process).

"Nice to have":

- Certifications, awards (awarded at a national level, a zone, or a division). Certificates are currently generated manually, outside the CRM.
- Non-skiing event registration similar to current NDS.
- Inventory management (jackets, equipment, etc.).

2.3 ACCESS LEVELS

- Regular patroller
- Instructor
- Instructor trainer
- Patrol administrator
- Zone administrator
- Division administrator
- Natinoal Management Committee / Board of Directors
- National Office Administrator

More details about these roles in the next section.

2.4 **USER STORIES**

Preliminary condensed set of user stories (use cases), provided by Greg McCormick and Diane Lemay.

1. As a Regular Patroller
   1. Register
   2. Pay annual certification fees (dues)
   3. Update personal information
   4. Search for patrollers nationally (limited to what member wants to share)
   5. Education materials (Portal – currently Shared Files)
   6. CISM (Portal – currently WIP)
2. As an Instructor
   1. log hours and courses delivered
   2. course calendar (Portal)
3. As an instructor Trainer
   1. Certifies/Renews Instructors – can provide access to #2
4. As a Patrol Administrator
   1. Year-end financial reporting
   2. Member reporting
      1. paid/unpaid dues
      2. full member details
   3. Editing of records in their jurisdiction
5. As an Zone Administrator
   1. Same as #4 but responsible for multiple patrols
   2. Editing of records in their jurisdiction
6. As a Division Administrator
   1. Same as #4 & #5 – multiple zones and patrols
   2. Editing of records in their jurisdiction
7. As a National Management Committee / Board of Directors
   1. Full view access of all data
   2. Management Committee has editing
8. As a National Office Administrator
   1. Same as #4, #5, #6 – national view
   2. Reports (financial / statistical)
   3. Refunds for certification fees

2.5 **KNOWN RISKS**

- (medium) Data migration: The current management system has 87 database tables in MySQL that are not strictly relational.
 - We have had a look at the schema and the data structure seems fairly clear, and we also

have access to the source code of the NDS if necessary. It might also be possible to ask questions to the author.

- (medium) Price sets/grids: "The registration fees are broken down into three levels (zone, division and national). The national fee is the baseline, and the division level could have nine options, with the zone level having possibly 56. In reality many would charge the same rate. We can work on a matrix to show the levels."
  - We can have different pricing per zone/division, and on public/backend forms, display only a specific price option to a person depending on their zone. Configuring the pricing might be something that zone/divisions need to email the national level to update, or if that's too much overhead (i.e. if most divisions change every year), we could have a configuration option where local admin/leaders can update the pricing for the specific option that concerns them.
- (medium) The current system is very customized to CSP's requirements. A more general CRM might require a few steps where the old NDS required only one.
  - For example, configuring the various people responsible for a zone/division would be done through relationships in CiviCRM, which would require updating relationships one at the time (whereas the NDS makes it easy to update a few people at once). Depending on the frequency of the data updates, we can optimize this later on with custom interfaces (which are fairly easy to create, but they do add up, so we prefer to wait until the priorities are based on real-world usage).
- (low) Renewal process: "all members are made inactive on June 1 every year. When you return to training (typically in the fall) the member record is made active and the collection of fees and education scores is documented for the new fiscal year." [...] "The zone is invoiced for the fees for the number of members in the zone. They remit the division and national portion of the fees and keep the remainder. Each division and zone sets their own surcharges to the national rate."
  - Also worth noting: currently only 2-3 zones have online payment and they still remit to national in one lump sum. CSP would like to move to a national solution.

To reduce the risks, CSP mandated Symbiotic to do an assessment of the current NDS and discuss migration/change management strategies.

2.6 ESTIMATE

Task	Estimate (hours)
Getting started, discovery, general setup of minor features (ex : phone book, email, awards)	20
Donation form setup with charitable tax receipts	15
Membership form setup, renewal process	40
Self-serve portal setup, user dashboard	25
Awards system	20
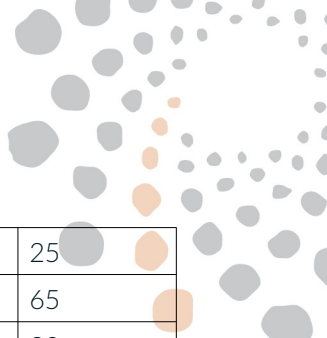
Access restrictions by regions (ACLs) or type of data	25
Data migration from the old CRM	65
Accounting integration/reports	20
Single-sign-on integration with other tools	15
Custom reports	25
Easy export/import for division/zone admins, for bulk updates of contact/member info	15
Training (zoom, in person in Montreal, or docs)	20
Post-launch tech support	20
General communications	20
Contingencies	25

Coop SymbioTIC only invoices actual hours worked. Our non-profit rate is 95 CAD per hour. The total budget would be 370 hours, for a total of $ 35,150 (plus applicable taxes).

2.7 HOSTING

Package C at 100$cad/month.

1. Hosting of both CiviCRM and WordPress
2. Regular upgrades (usually every 4 months, unless there is a security upgrade, regular backports if we find bugs)
3. 24/7 monitoring, including the civimail queue, https and other diagnostics that run regularly
4. 25 GB disk space
5. Send up to 65,000 emails per month
6. Custom design/branding
7. Custom domain
8. Virtual private server (VPS) with 4 GB memory, fast SSD disks.
9. Daily backups

https://www.symbiotic.coop/en/turn-key-civicrm-hosting

2.8 WORK CALENDAR

The project can start within 3 weeks after getting approved and should span over a period of 3 to 4 months.

- The new CRM will be accessible from day 1 (with our generic configuration), so that we will be able to iterate quickly and get feedback early on in the process.
- We will use a separate instance for testing data imports (from the old system), where you will also be able to review the quality of the data imported.
- Once you are comfortable to switch system, we will set an official migration date, where we

will run the data migration into the new production instance. At this point, the old system should be placed offline, or at least, not accessible to the public, as any changes in that system will not be copied into the new system.

- After the change of systems, we will enter the "post-launch" phase, where we will respond very quickly to any issues that had not been caught in the previous testing phases.

2.9 PAYMENT

Work will be invoiced at the end of the month, based on the hours worked. Weekly automated reports of work done will be sent by e-mail.

Payments are due upon reception and the payment must be received within 30 days or the service may be suspended. Any late payment will be subject to interest of two percent (2%) per month compounded monthly (equivalent to a yearly interest rate of 26.86%). Bounced checks are subject to a penalty fee of $20. All prices are in Canadian dollars (CAD).

2.10 GENERAL TERMS AND CONDITIONS

To know more about our general terms and conditions, please visit:

https://www.symbiotic.coop/en/general-conditions-civicrm-hosting