



# MEMBER MANAGEMENT WITH CIVICRM

Canadian Ski Patrol

Référence : contrats:projets:ski-patrol:contract  
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# 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 REQUIREMENTS

- Provide a modern, easy to use CRM, that can scale to the needs of a national organisation
- Mobile-friendly access
- Self-service member portal
- Bilingual forms/portal
- 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)
- Member management
- Certifications, awards (awarded at a national level, a zone, or a division). Certificates are currently generated manually, outside the CRM.
- Email communications with members and other types of supporters
- Donation tracking and charitable tax receipts
- Contact engagement automation (ex: potential member submits a form to signal their interest, local rep contacts the person, begins the membership process).
- Phone book
- Single-sign-on integration with other CSP tools (access to first-aid manual, other member-only portal features, SSO to Moodle).

### 2.2 KNOWN RISKS

- Data migration: The current management system has 87 database tables in MySQL that are not strictly relational. Understanding the schema may not be easy, but we will have access to the PHP code.
- 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.”
- 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.”
- Member invoices: “We don't produce invoices. The national office scans the zone's member records for changes on set dates and sends an notice to the zone for the payment of the members.”

## 2.3 ESTIMATE

| Task   | Estimate (hours) |
|--|------------------|
| Getting started, discovery, general setup of minor features (ex : phone book, email, awards) | 25               |
| Donation form setup with charitable tax receipts   | 15               |
| Membership form setup, renewal process   | 35               |
| Self-serve portal setup, user dashboard  | 25               |
| Access restrictions by regions (ACLs) or type of data  | 25               |
| Data migration from the old CRM  | 65               |
| Accounting integration/reports   | 20               |
| Custom reports   | 25               |
| Training (zoom, in person in Montreal, or docs)  | 20               |
| Post-launch tech support   | 20               |
| General communications   | 15               |
| Contingencies  | 20               |

Coop SymbioTIC only invoices actual hours worked. Our non-profit rate is 95 CAD per hour. The total budget would be 305 hours, for a total of \$ 28,975 (plus applicable taxes).

## 2.4 HOSTING

Package C at 100\$cad/month.

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

<https://www.symbiotic.coop/en/turn-key-civcrm-hosting>

## 2.5 WORK CALENDAR

The project can start within 2 weeks after getting approved and should span over a period of 3



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.

## 2.6 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 . All prices are in Canadian dollars (CAD).

## 2.7 GENERAL TERMS AND CONDITIONS

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

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