Implementing User Portals: Leveraging the Power of CiviCRM

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BackOffice Thinking

CZC
COMFORT ZONE CAMP

Implementing User Portals

- Who is Comfort Zone Camp?
- Legacy platform
- Analysis / Design / Buildout
- Site Walkthrough
- Summary / Q&A

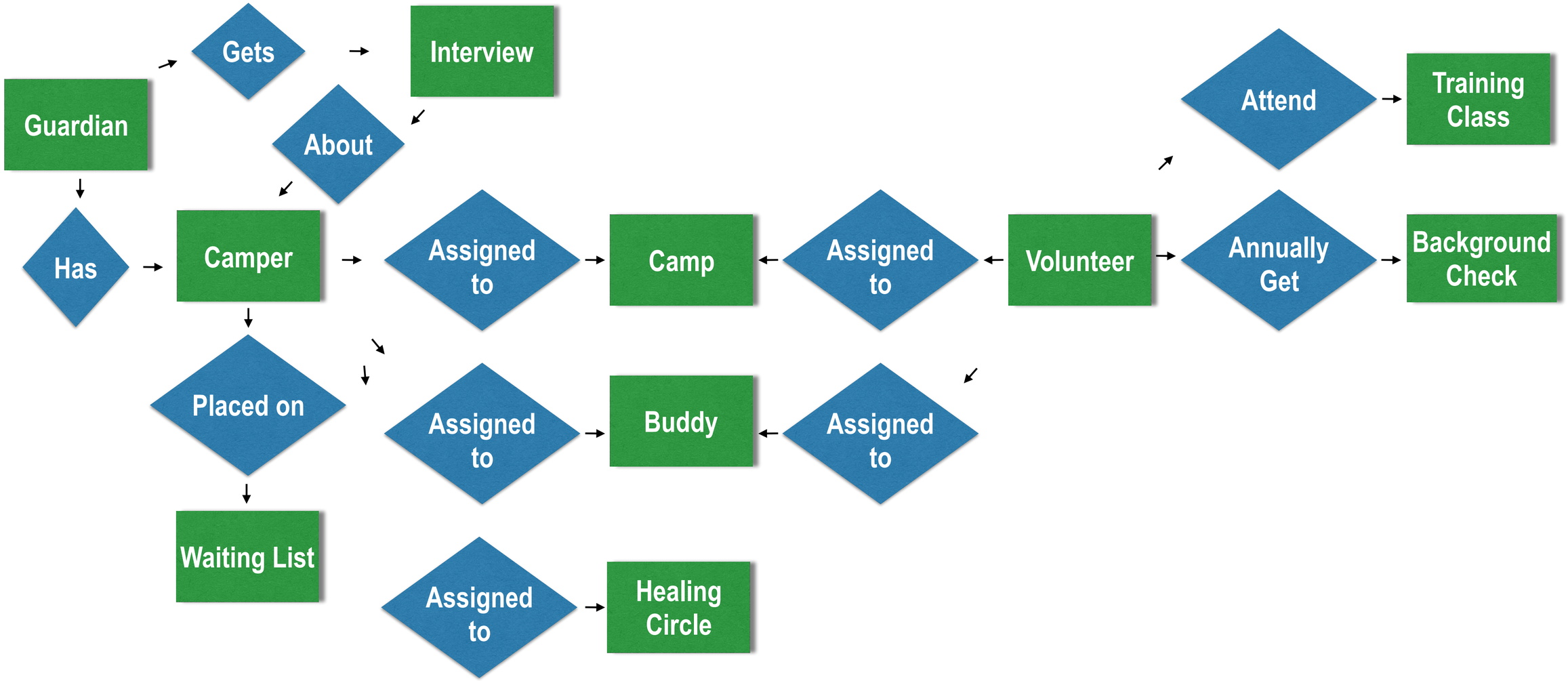
What is Comfort Zone Camp?

- The nation’s largest bereavement camp.
- Camps are offered free of charge to children ages 5-25 who have experienced the death of a parent, sibling, or guardian.
- Camps are held year-round in California, Florida, Massachusetts, New Jersey, North Carolina, and Virginia.

How Comfort Zone Helps

- Camps create an environment where grieving children can have fun and break the isolation death often brings, while learning valuable coping skills for their daily lives.
- Our unique matching process allows each camper to be matched 1:1 with an adult Big Buddy based off of their unique interests and needs. The Big Buddy is a friend and mentor and provides emotional support
- Comfort Zone also hosts grief support groups, psycho-educational workshops for adults, children, and teens throughout the year, providing a network of support for the whole family and community.

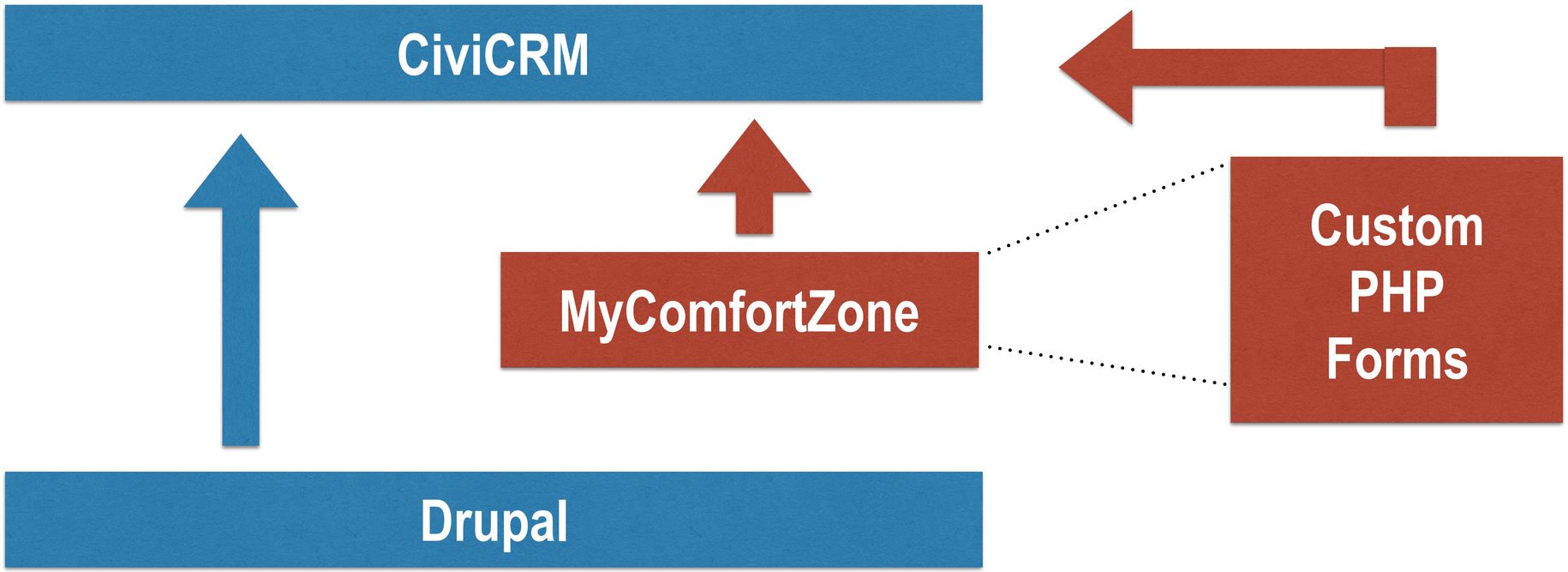
Entity Relationship Model



Legacy System

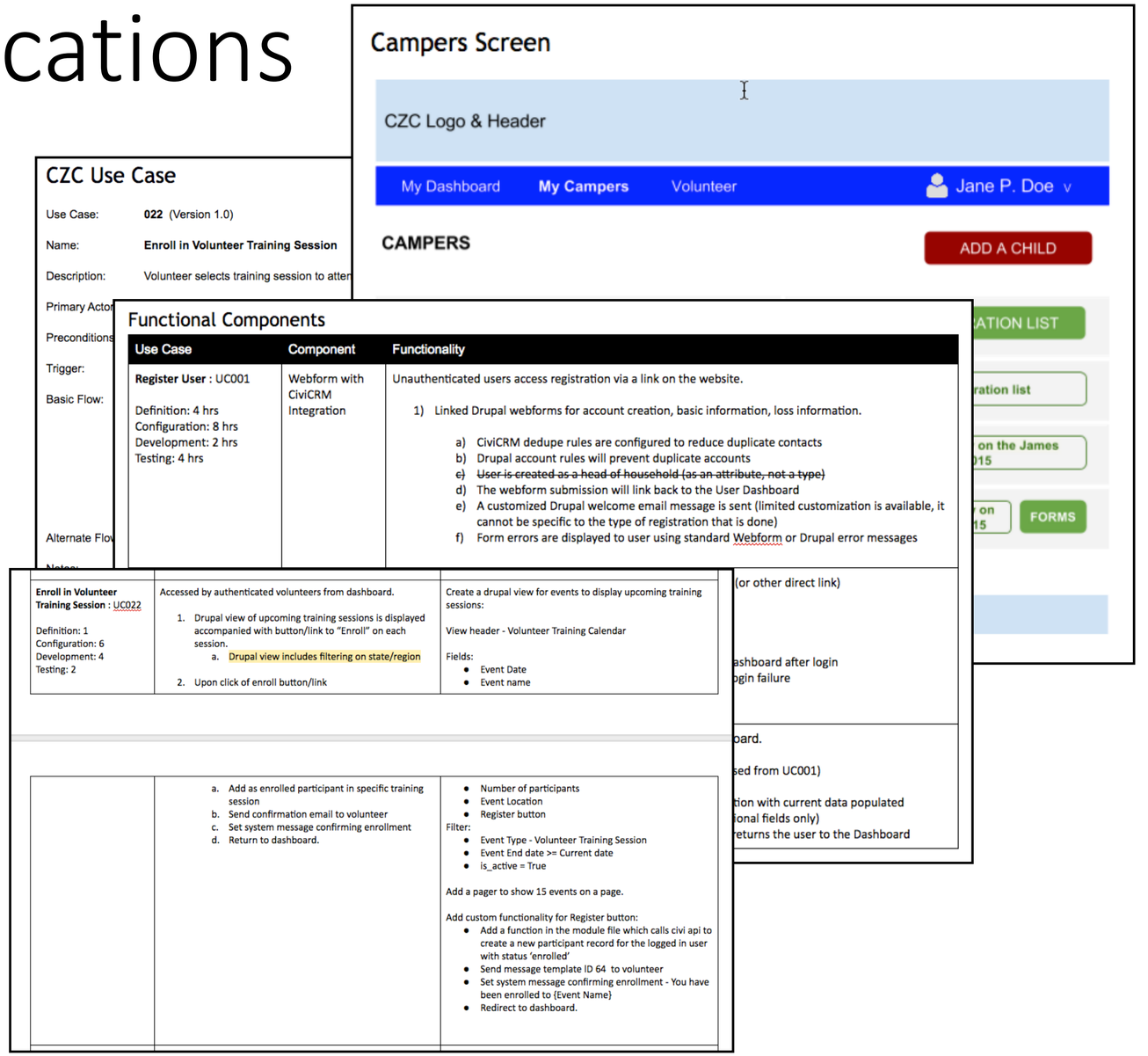
- Drupal 6 / CiviCRM 3.4
- Added layer of obfuscation
- Lost data!
- Lengthy manual processes required
- 40 page manual to just process incoming camper
- Any changes risked breakage
- Staff had no faith in system

Legacy Platform- Added Layer of Obfuscation



Requirements / Specifications

- Interviews, Reviews — many hours
- Use cases - 27
- Functional specification
- Technical specification
- Data migration specification
- Mockups
- Legacy Site Change Specification

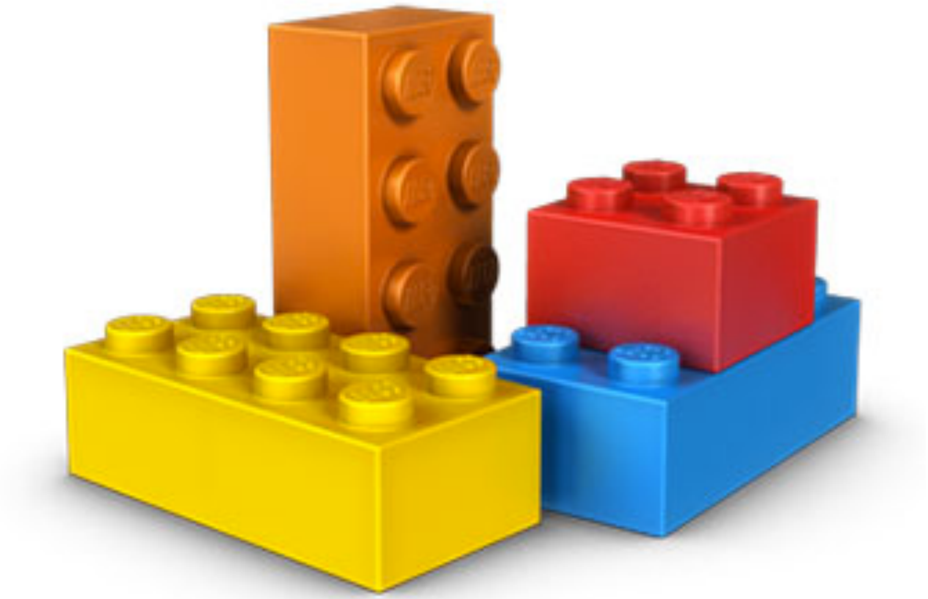


Business Processes

- Define current processes
- Ask why?
- Challenge the norm
- Refine processes to best utilize CiviCRM’s design

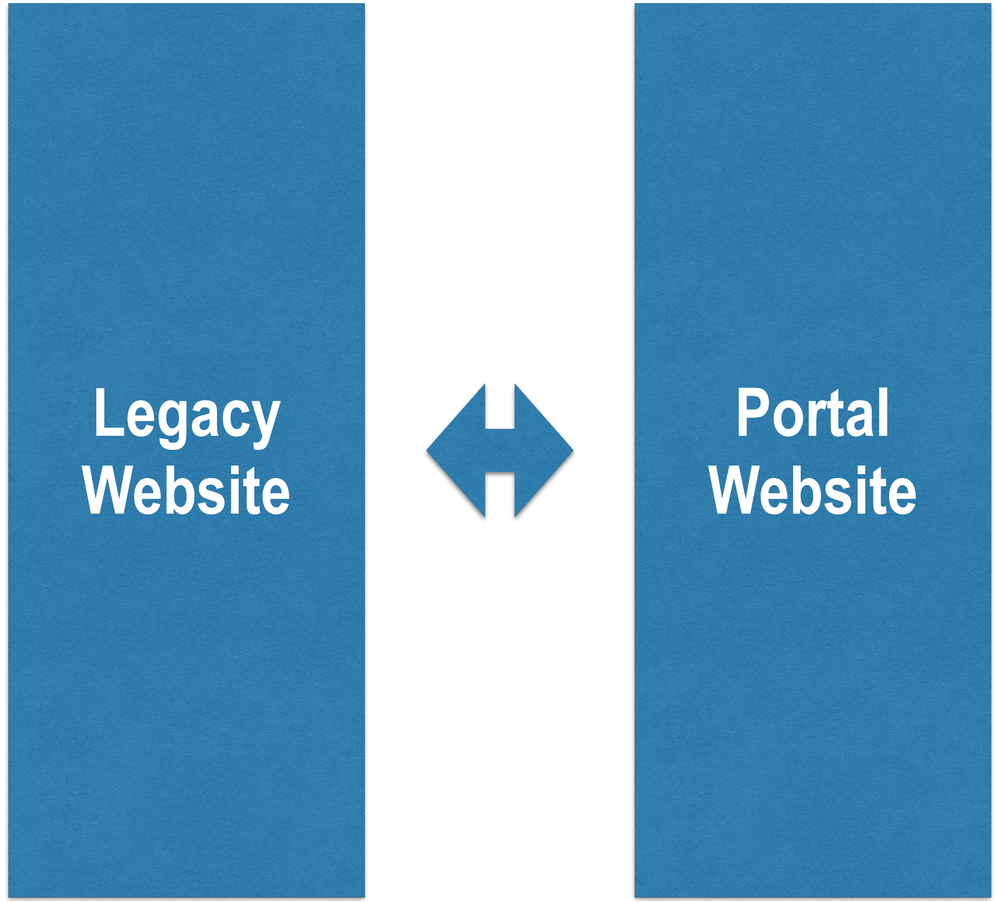
Architecture

- Leverage the best of all worlds:
  - Drupal Login to manage accounts with associated Roles
  - Drupal Views — perfect for tabular displays — i.e., Lists (camps, training classes, campers)
  - CiviCRM Profiles — most basic forms
  - Drupal Webforms — advanced forms — validation
  - Jasper reports — complex reporting needs
  - Exceptional Look/Feel design and execution



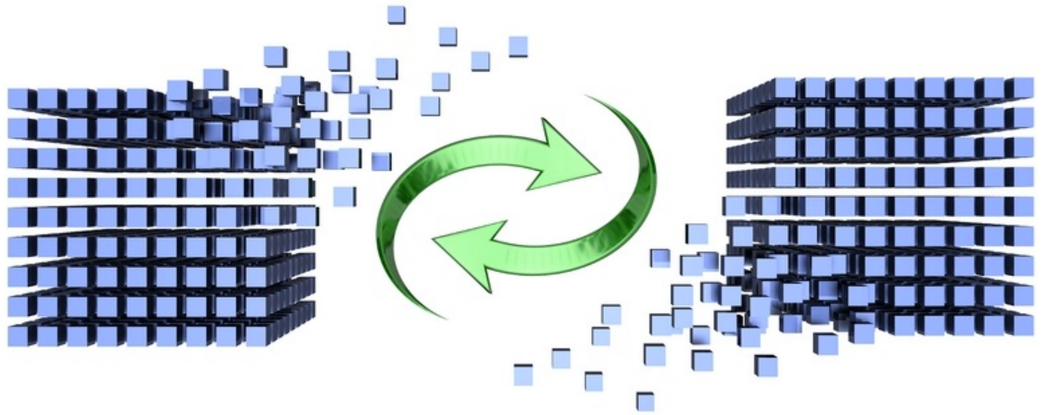
Integration with Legacy Site

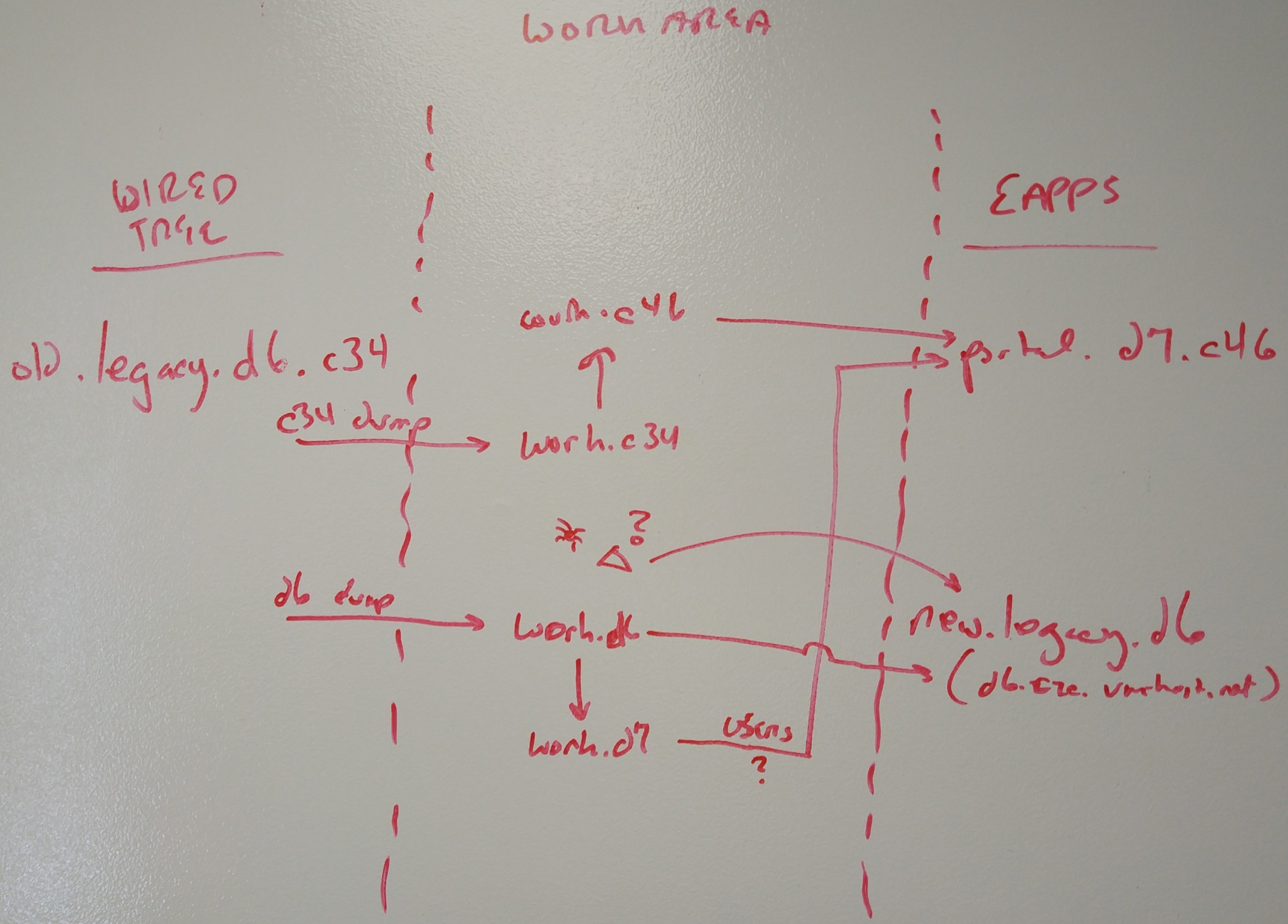
- Existing D6 site retained and converted to informational site
- New, D7, Portal site created as subdomain: my.comfortzonecamp.org
- Links on D6 site that previously went to legacy forms, redirected to portal
- Legacy site Calendar's converted to RSS feeds of Views from Portal
- Contribution form links simply changed to point to portal contribution form



Data Migration- ETL

- Contacts
  - Guardians (Drupal users as well)
  - Campers (are possible Guardians too!)
  - Volunteers
  - Losses
- Custom Data
- Relationships
- Events
- Participants




WORK AREA
WIRED TREE
EAPPS
old.legacy.d6.c34
c34 dump
d6 dump
work.c46
work.c34
work.d6
work.d7
portal.d7.c46
new.legacy.d6
(d6.eze.varhost.net)
users
?

Buildout

- Project Management - Redmine
    - Tasks generally under 8 hours
    - Weekly internal meetings
    - Manage to Milestones using 2-Week Sprints
- Regular Status Calls with Client
    - Weekly
    - Monthly with Management
- Custom Coding
- Quality Assurance using Use Cases

Site Walkthrough

Results

- Manuals? We don’t need no stinkin’ manual!
- Comments from constituents…. “That’s all?”
- Ease of use for grieving users
- Greatly improved business processes
- No more lost data!!
- Staff has gained confidence in CiviCRM

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