

# Embracing Age and CiviCRM:

Empowering a small charity with limited IT  
resources to fulfil its mission

Tina English, Director

Patrick Gillen, Volunteer

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# A Setting the Stage: Our Journey with CiviCRM



Befriending care home residents

Supporting informal carers

Take our contacts on journeys

Process donations

Manage events

Automate tasks

Be easy to use

Be affordable

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# B Building the Foundation: Configuration, Migration, Integration, and Solutions

Discovery Phase  
~ 2 months

- Background
- Requirements
  - Frustrations w/ Insightly
  - Situation-Process Use-Cases
- Shortlist
- Evaluation

	Spark CiviCRM	Dynamics 365	Salesforce	Insightly
Cost w/ ext.	1	4	2	3
User-Fr. Admin	2	3	3	1
User-Fr. User	2	1	1	1
Risk	1	4	3	2
Total	6	12	9	7

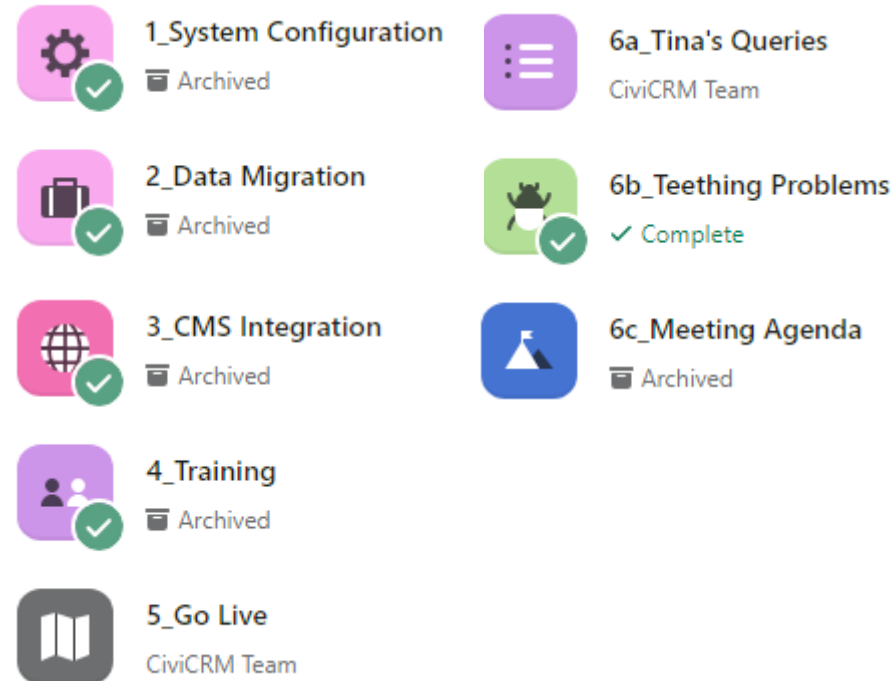
Others, e.g., [charitylog](#), [Simply Connect Core CRM Database](#)


Omitted: [HubSpot](#)

Implementation Phase  
~ 4 months, ≥ 200 hours<sup>1</sup>


Collaboration =


 asana +  Google Workspace +  zoom





1\_System Configuration 


6a\_Tina's Queries  
CiviCRM Team

2\_Data Migration 

6b\_Teething Problems  
 Complete

3\_CMS Integration 

6c\_Meeting Agenda  


4\_Training 

5\_Go Live  
CiviCRM Team

<sup>1</sup> Learning : Doing = 50 : 50

# B1 Tailoring the System: Configuring CiviCRM to Fit Our Needs

## Get Hosted CiviCRM

1. Compare [CiviCRM Spark](#), [Bluehost](#), etc.
2. Subscribe to [CiviHosting](#)
3. Document due diligence on shared host
4. Register for [Suresupport](#)
5. Get CiviCRM extensions (see Appendix)
6. Open account with [Stripe](#)
7. Configure [Amazon Simple Email Service](#)

Reference: [Using CiviCRM 2<sup>nd</sup> ed.](#)

## Configure CiviCRM

### Functionality

Administer

Contacts,  
Activities, Custom  
Data, Groups

CiviContribute

CiviEvent

CiviMail

- Initial walk-through
- Discuss internally
- Configure

## Other Configurations

### Functionality

CiviRules

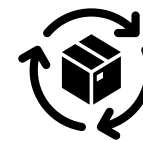
~~CiviReport~~  
SearchKit

GDPR

UK Gift Aid

- Initial walk-through
- Document requirements
- Implement requirements
- Test requirements

## B2 Seamless Transitions: Migrating Data with Accuracy and Efficiency



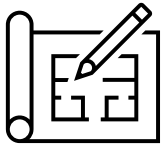
Type	Source	Issues
(Contacts) Organisations	<a href="#">Insightly</a> CSV export	<ul style="list-style-type: none"> <li>• Non-ASCII (<a href="#">handy tool</a>)</li> <li>• Incorrect county names</li> <li>• Ill-formed email addresses</li> <li>• Post codes entered as phone numbers</li> </ul>
(Contacts) Individuals	<a href="#">Insightly</a> CSV export	<ul style="list-style-type: none"> <li>• Messy ill-formatted or inconsistent data (<a href="#">OpenRefine</a>)</li> </ul>
(Contacts) Organisations, Individuals	Miscellaneous contact spreadsheets	<ul style="list-style-type: none"> <li>• Duplicates de-dupped in CiviCRM</li> </ul>
(Contacts) Organisations, Individuals, Events	<a href="#">Eventbrite</a> CSV export	
(Contacts) Organisations, Individuals, Events	<a href="#">Mailchimp</a> CSV export	
Activities	Volunteer hours spreadsheets	<ul style="list-style-type: none"> <li>• Residents not recorded</li> </ul>
(Contacts) Organisations, Individuals, Contributions	<a href="#">CAF</a> CSV export	

Document data cleaning assumptions & processing steps, mappings, import issues & limitations

## B3 Bridging the Gap: Integrating CiviCRM with Our Content Management System



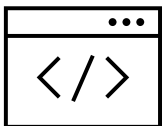
Many unnecessary cycles burned on this part of the implementation, trying CiviCRM's [Form Builder](#) (a bit underwhelming), [WPForms](#) (a bit expensive), and [Contact Form 7](#) (worked quite well), when Embracing Age was already using and proficient in creating [Google Forms](#).



Instructions for connecting Google Forms to CiviCRM documented given in [this post](#) on Stack Exchange CiviCRM.



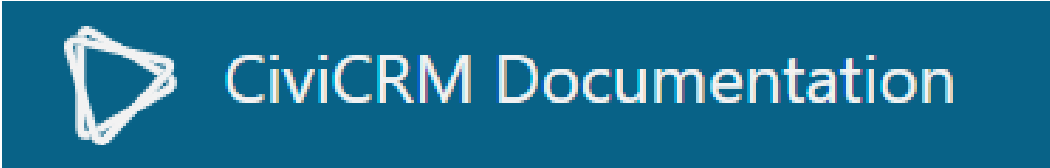
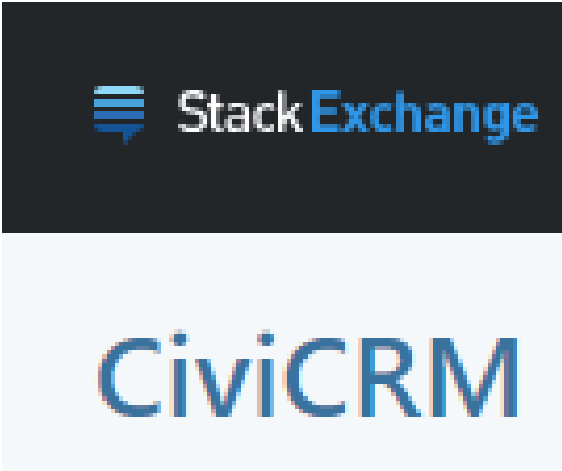
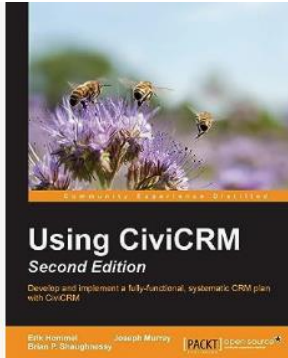
Google Forms + CiviCRM Form Processor + CiviRules + Other CiviCRM Extensions (Action Provider, Email API, Extended Contact Matcher) combine to provide an extremely flexible input channel enabling an impressively high degree of downstream automatability.



[Google Forms](#) are embedded in Embracing Age's CMS using [iFrames](#).



# B4 Finding Solutions: Leveraging Community Support and Helpdesks



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# C Launching Successfully: Training, Going Live and Overcoming Initial Challenges

Staff were on board from the outset

1. Set a launch date
2. Created a shared user guide
3. Had two training mornings
4. Gave staff a few weeks to play, creating test contacts
5. Had a go live week where we ironed out initial challenges

## User Guide

- Simple introduction to CiviCRM and how to do everyday tasks
- Outline of Embracing Age processes
- Specific ABC user guide for each process
- Summary of CiviCRM implementation

1. Not all completed forms went into CiviCRM
2. Automation went wrong occasionally
3. Permissions caused problems with registering for events

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## D Exploring Innovation: Cool Features and Automation within CiviCRM

Different layouts for  
different contact  
types

Chasing up volunteer  
application forms is  
automated

Form Processors

Cases / Journeys

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# E Looking Ahead: Continuous Improvement, Future Plans, and Final Thoughts

Stewardship of  
volunteers

Giving platform on  
website

Stewardship of  
donors

You need a Patrick!

Steep learning curve

IT'S WORTH IT!

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# F Appendix: Unlocking Capabilities - Our Chosen CiviCRM Extensions

Extension Name	Version	Combined Functionality	Installation Method	Provider
Action Provider	1.125	Automation	UI	Jaap Jansma
CiviRules	2.49	Automation	UI	CiviCoop
CiviRules Logger	1.3	Automation	UI	Jaap Jansma - CiviCoop
Email API	2.9	Automation	UI	Jaap Jansma - CiviCoop
Extended Contact Matcher		Automation	Backend	
API Key Management	1.3.5	Integration	UI	Nicolas Ganivet Mikey O'Toole
Form Processor	1.58	Integration	UI	Jaap Jansma
Airmail	2.2	Mailer configuration	UI	Alice Frumin
Birthday		Miscellaneous system	Backend	
Mosaico	3.1.1687383640	Newsletter	UI	Matthew Wire
Firewall	1.5.9	Online donations	UI	Matthew Wire
Stripe Payment Processor	6.9	Online donations	UI	Matthew Wire
UK Gift Aid	3.5.2	Online donations	UI	MJW Consulting at al.
CiviCRM Export to Excel	2.5	Reporting	UI	Mathieu Lutfy
Summary Fields		Reporting	Backend	
CiviCRM Log Viewer	1.4	System enhancements	UI	Alan Dixon
Contact Layout Editor		System enhancements	Backend	
Recent Items Menu	1.5	System enhancements	UI	Coleman Watts
Relationship Block	1.6	System enhancements	UI	Eileen Naughton
SearchKit	5.62.1	System enhancements	UI	Coleman Watts
Shoreditch		System enhancements	Backend	
Shoreditch on Wordpress		System enhancements	Backend	
Signature Extensions		System enhancements	Backend	
Sweet Alert	1.5	System enhancements	UI	Mathieu Lutfy