From data to governance

with CiviCRM

It all started with a simple request …

Can we do a management dashboard with CiviCRM?

USCJ Seek meaning together

- Founded in 1913, it federates congregations of the Conservative Movement of Judaism

- 600 congregations across North America
- 7 geographic districts, each led by a dedicated KRM

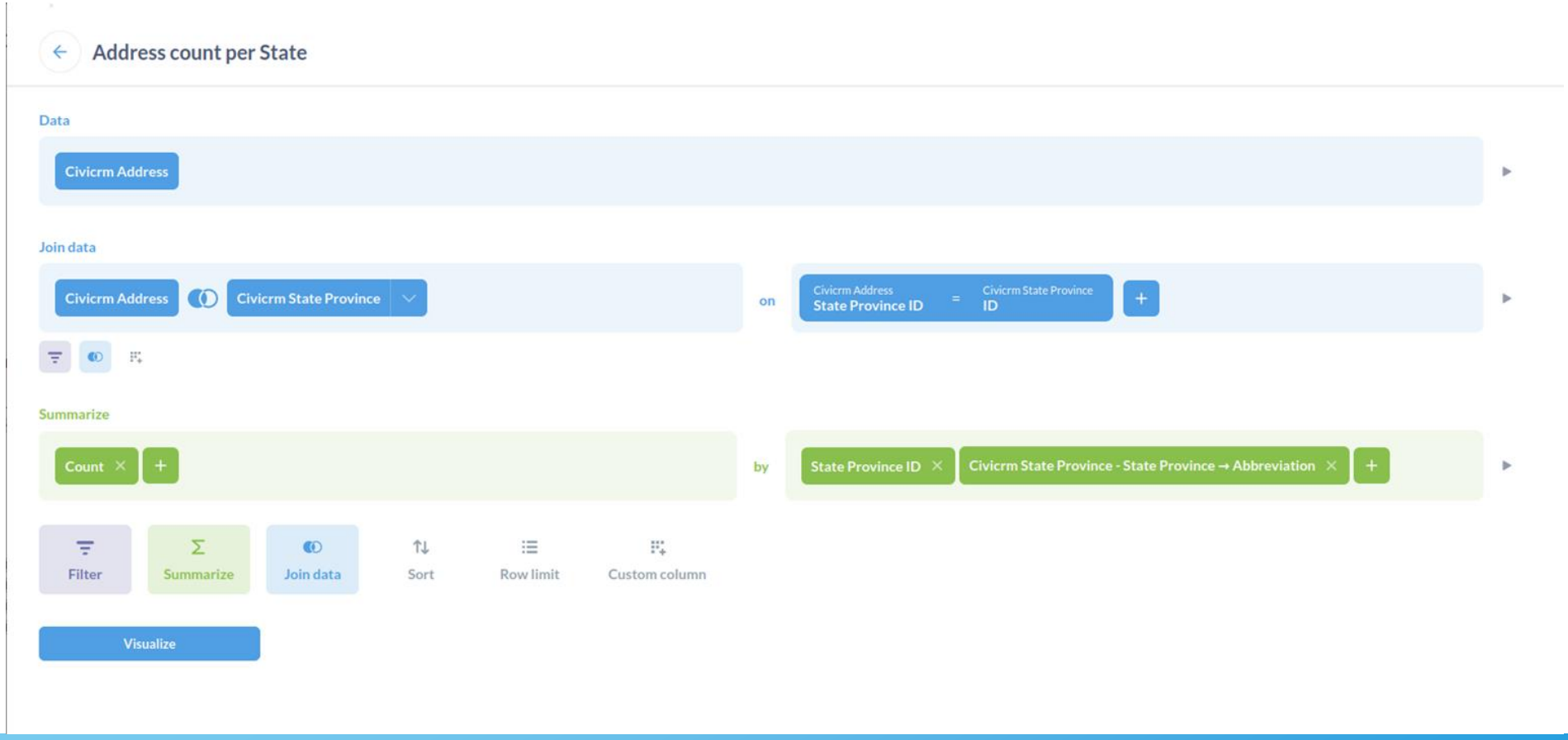
- ~12 M$ revenue, ~9 M$ spent in program services
- 50 employees

Requirements

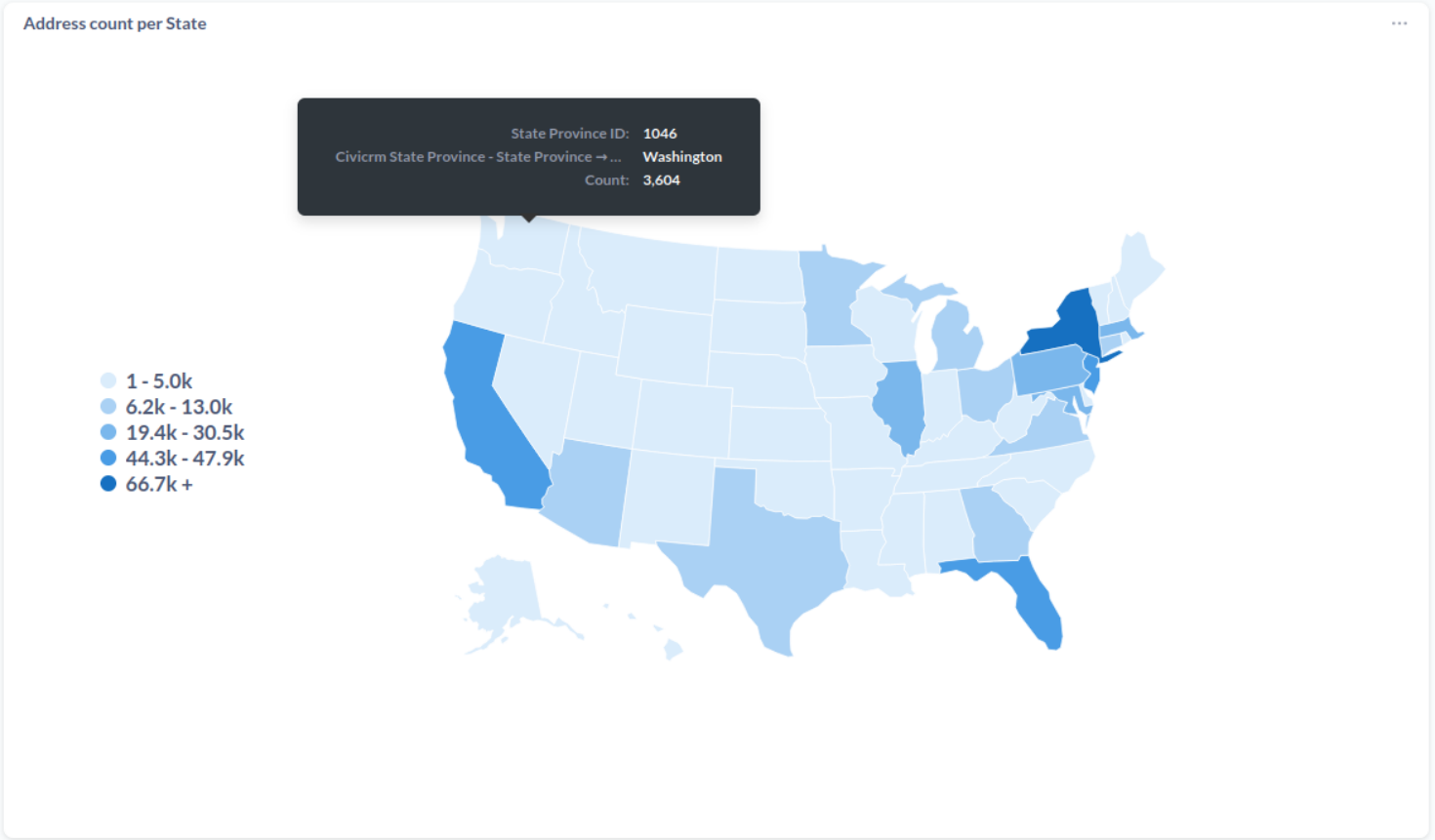
- Nice selection and options for graphs
- Create user-friendly dashboards
- Include other data in addition to CiviCRM’s
- No outside service access to CiviCRM data
- Can be accessed from CiviCRM, but also externally

- Need a full-fledged BI software
- Open Source, easy to install/manage, has API, ...

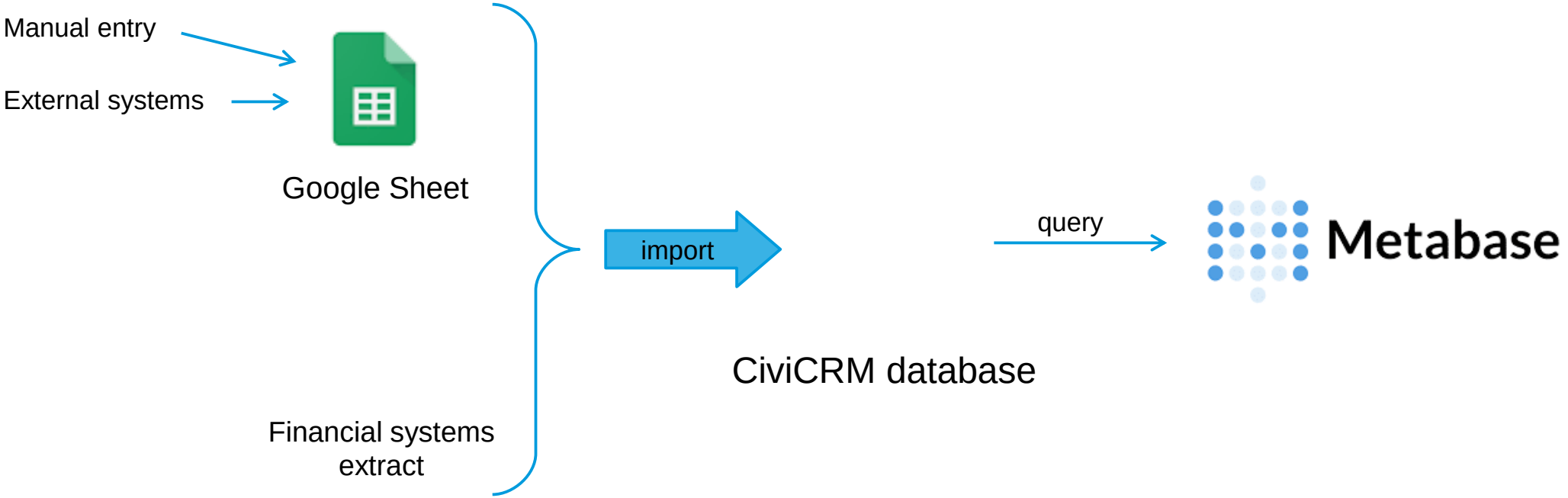
Metabase query builder



… instant map chart!



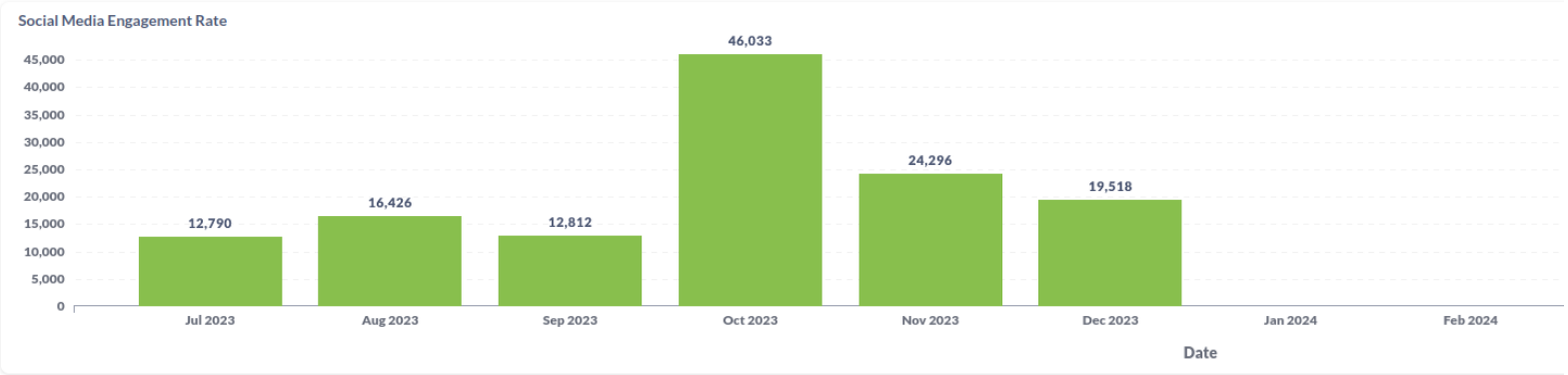
Architecture

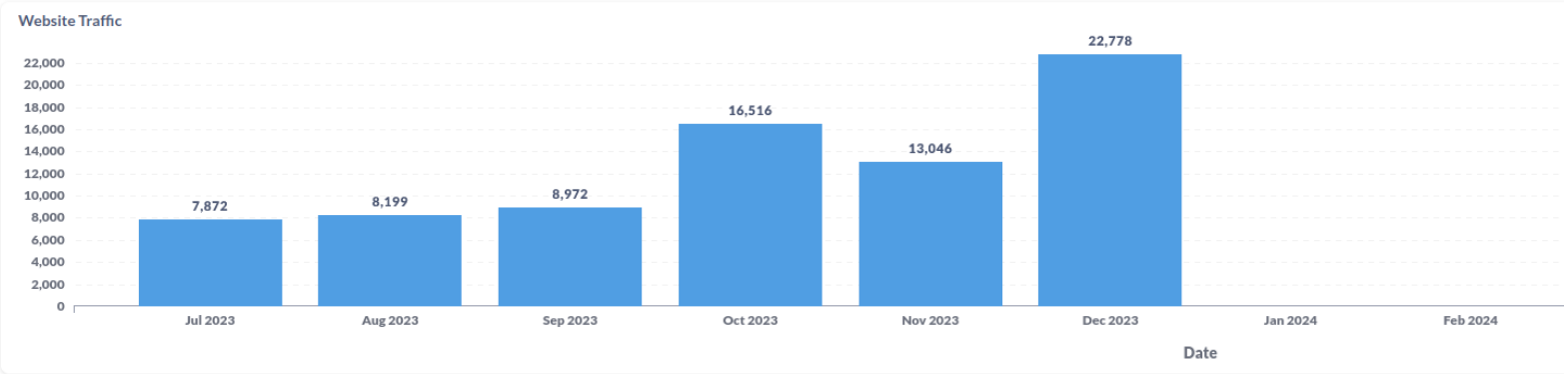


Simple charts

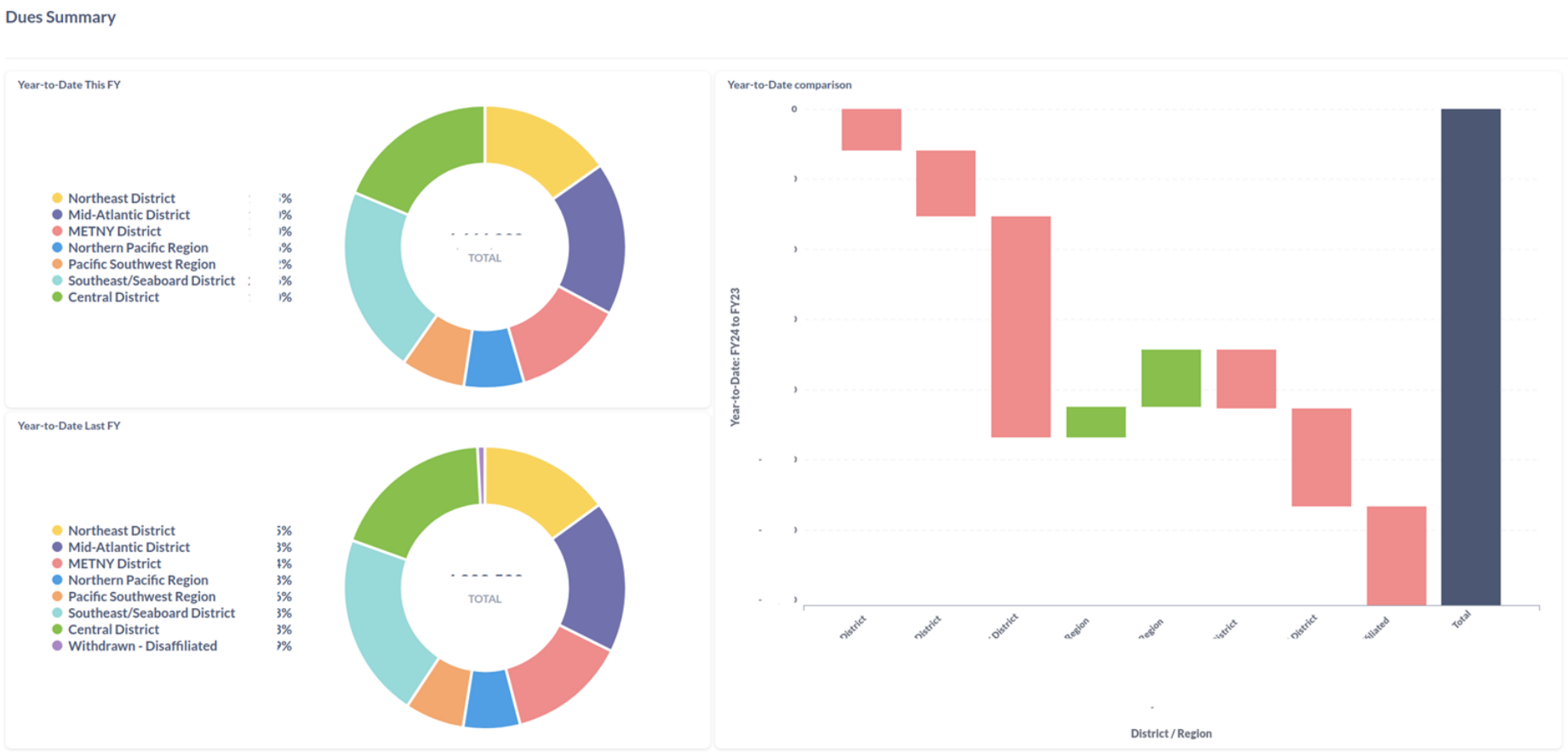
Charts with external metrics

Marketing

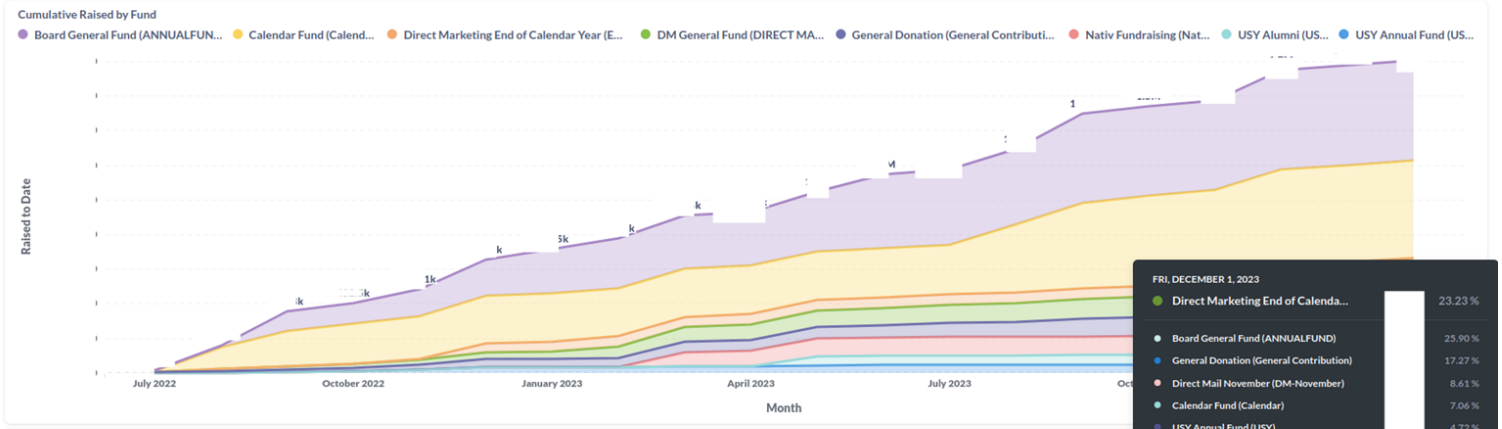


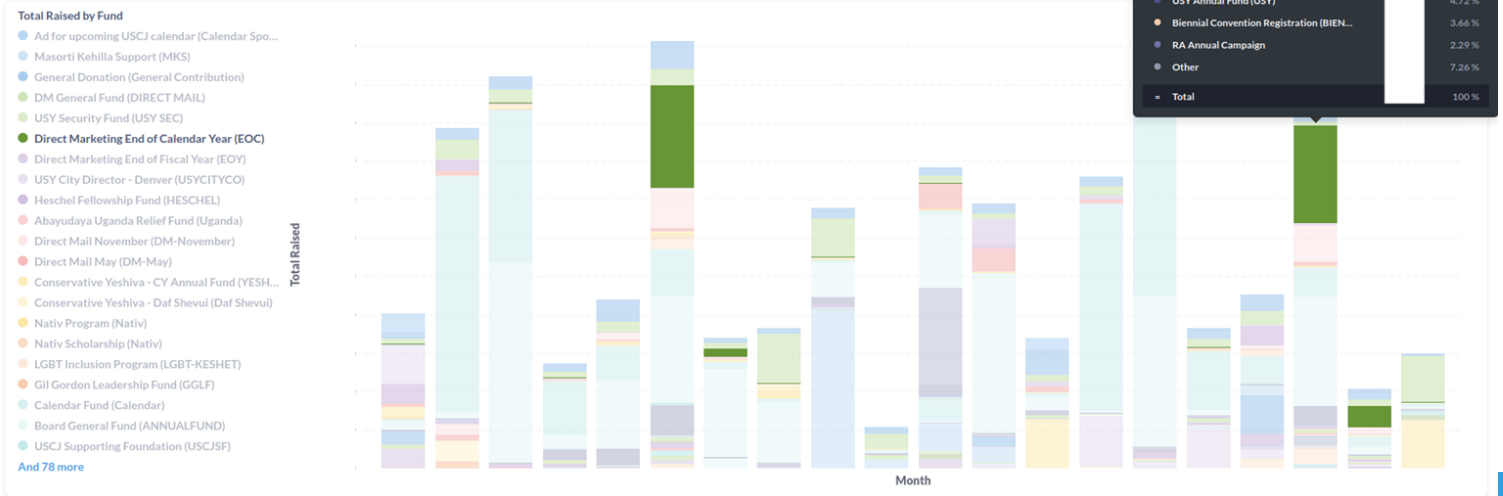


Advanced charts



Donations by Fund





… and not so simple queries

Year-to-Date Last FY

CiviCRM

```
SELECT stats.RegionID, regions.RegionName,
       COALESCE(SUM(SynYtDLastY), 0.0) AS YtoDLastY,
       COALESCE(SUM(SynYtDThisY), 0.0) AS YtoDThisY,
     -- '+/-' column calculation moved to report
       COALESCE(comm.Commitment, 0) AS dues_commitment,
     -- percent_met column calculated from -07-11
       ROUND(TIMESTAMPDIFF(DAY,'2023-07-11',CURDATE())/365*100) AS percent_due,
       ROUND(COALESCE(comm.Commitment,0) * TIMESTAMPDIFF(DAY,'2023-07-11',CURDATE())/365, 2) AS amount_
  FROM (
    -- We MUST have this first GROUP BY on Synagogue to account for CA exchange rate
    SELECT RegionID, SynagogueID,
      -- dues payments also calculated from -07-11 ... !!
      SUM(CASE WHEN PaymentDate BETWEEN '2022-07-11' AND DATE_SUB(CURDATE(), INTERVAL 1 YEAR) THEN IF(Cou
      SUM(CASE WHEN PaymentDate BETWEEN '2023-07-11' AND CURDATE() THEN IF(CountryId = 1039, PaymentAmoun
      FROM uscjdues_payments
           JOIN uscjdues_invoices USING (InvoiceID)
           JOIN uscjdues_synagogues USING (SynagogueID)
     WHERE PaymentType IN (10)
     GROUP BY SynagogueID
        ) stats
        LEFT JOIN uscjdues_commitments comm ON comm.RegionID = stats.RegionID AND comm.Year = '2024'
        LEFT JOIN uscjdues_regions regions ON regions.RegionID = stats.RegionID AND regions.Year = '2024'
-- ... and then a second GROUP BY to total by region
  GROUP BY RegionID
  ORDER BY RegionID
```

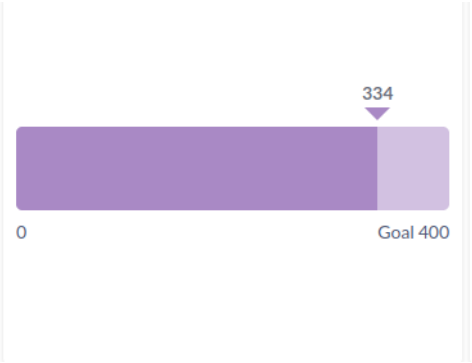
Donations Received

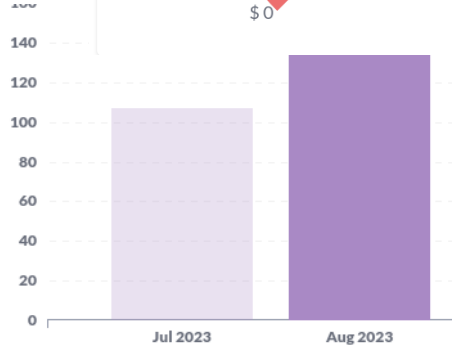
CiviCRM

```
SELECT fy.`Month`, stats.*
  FROM (SELECT '2023-07' AS `Month` UNION SELECT '2023-08' UNION SELECT '2023-09' UNION SELECT '2023-10'
        UNION SELECT '2023-11' UNION SELECT '2023-12' UNION SELECT '2024-01' UNION SELECT '2024-02'
        UNION SELECT '2024-03' UNION SELECT '2024-04' UNION SELECT '2024-05' UNION SELECT '2024-06') AS fy
       LEFT JOIN (

SELECT LEFT(receive_date, 7) AS 'Date Received',
       COUNT(*) AS 'Donations Count'
  FROM civicrm_contribution c
       LEFT JOIN civicrm_contact ct ON ct.id = c.contact_id
 WHERE c.receive_date > '2023-07-01' AND c.financial_type_id IN (14)
       AND c.contribution_status_id IN (1) AND c.is_test = 0
       AND ct.contact_type = 'Individual' AND ct.is_deleted = 0
 GROUP BY LEFT(receive_date, 7)

       ) stats ON stats.`Date Received` = fy.`Month`;
```

Where are we now?

- 10 dashboards, more than 50 charts
- … and additional report templates in CiviCRM!
- covers all functions of the organization :
- fundraising, membership, region mngt, marketing – website and communications, finance, hr, …
- used at the board level





Conclusion

There is a lot of historical data in CiviCRM,

it is more than an archive of the past.

Let’s turn it into knowledge and foresight,

to act as a guide for the future.