

From data to governance with CiviCRM

It all started with a simple request ...

Can we do a management dashboard with CiviCRM?

- 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, ...

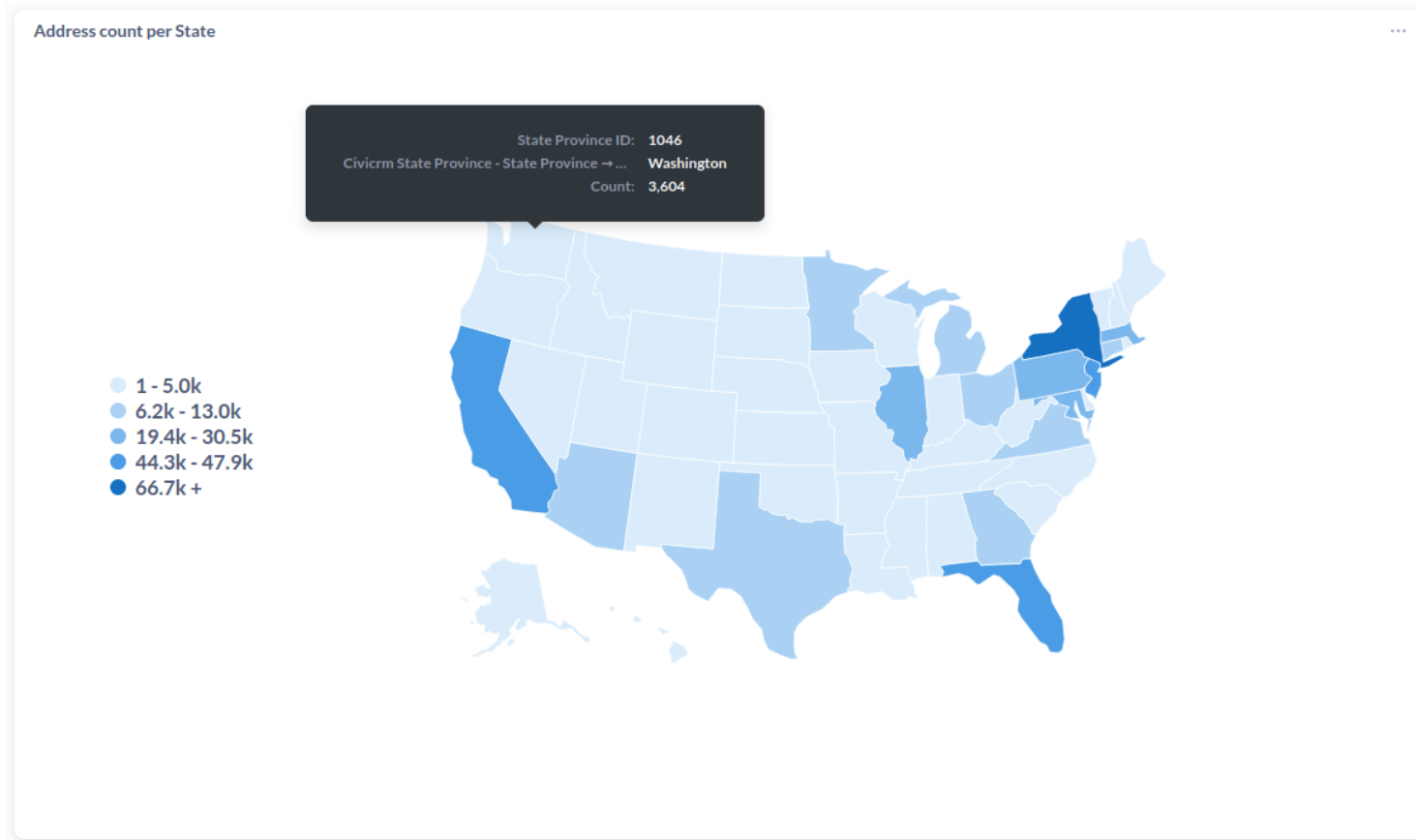
Metabase query builder

The screenshot displays the Metabase query builder interface for a query titled "Address count per State". The interface is organized into several sections:

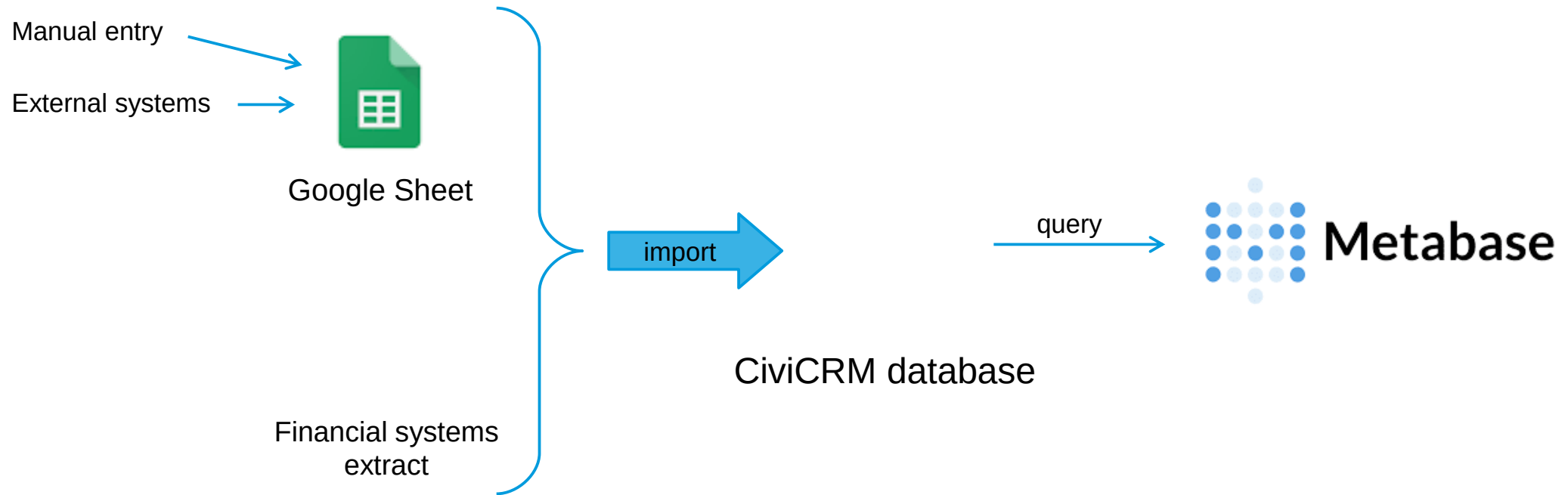
- Data:** A single data source, "Civicrm Address", is selected.
- Join data:** The "Civicrm Address" table is joined to the "Civicrm State Province" table. The join condition is "Civicrm Address State Province ID = Civicrm State Province ID".
- Summarize:** The aggregation function is set to "Count". The results are grouped by "State Province ID" and "Civicrm State Province - State Province → Abbreviation".

At the bottom of the interface, there are several control buttons: "Filter", "Summarize", "Join data", "Sort", "Row limit", and "Custom column". A "Visualize" button is also present at the bottom left.

... instant map chart!



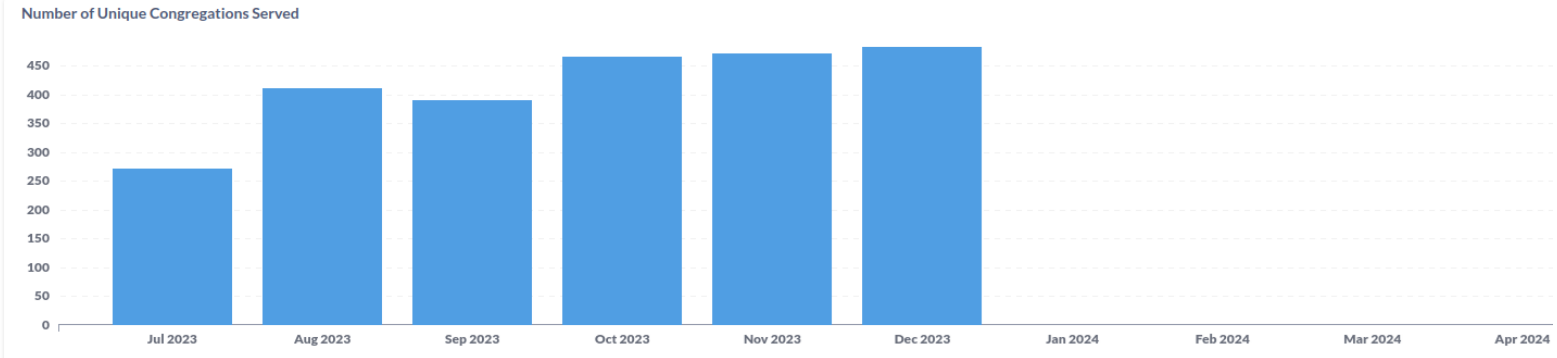
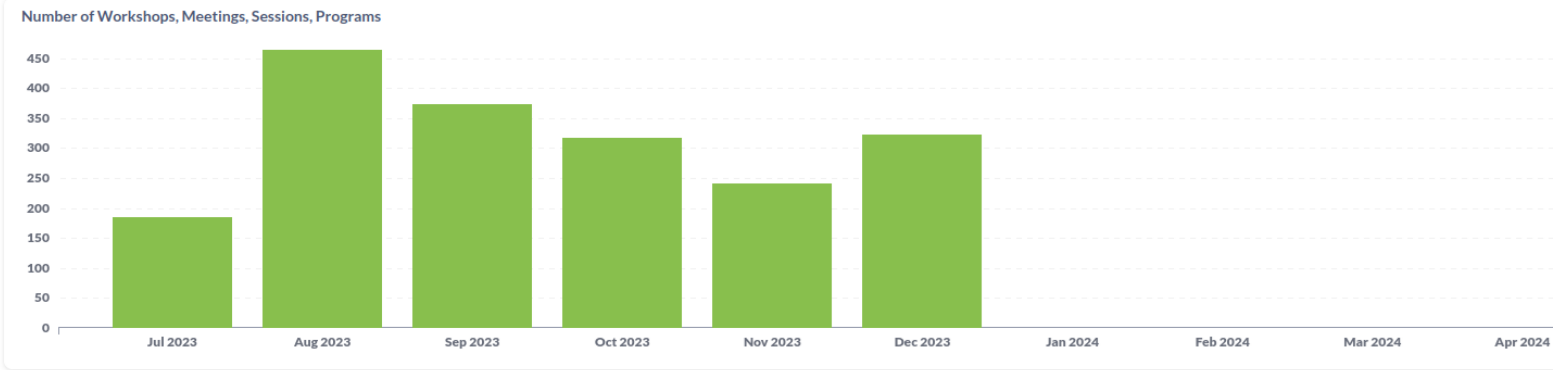
Architecture



Simple charts

Engagement

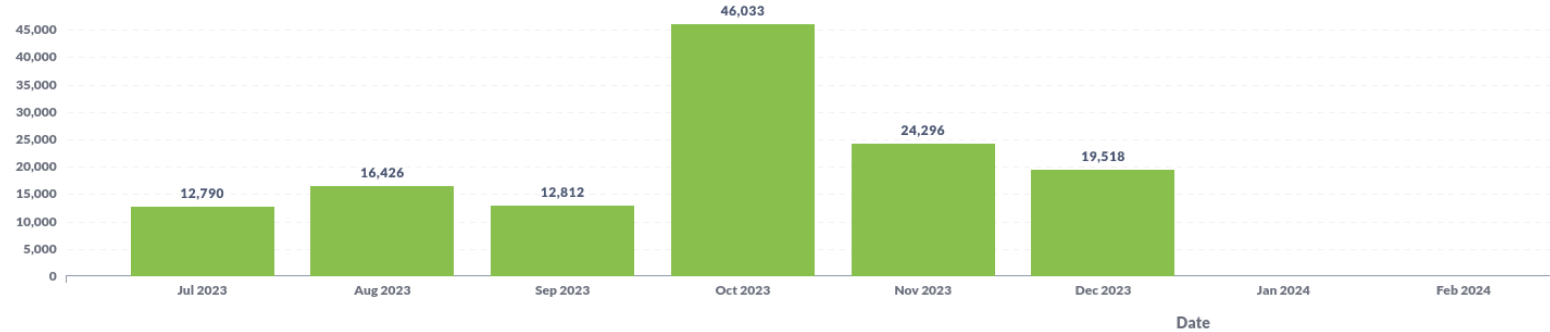
Teen Engagement Synagogue Leadership Exploring Judaism (Digital Engagement) Biennial Convening Individual Engagement



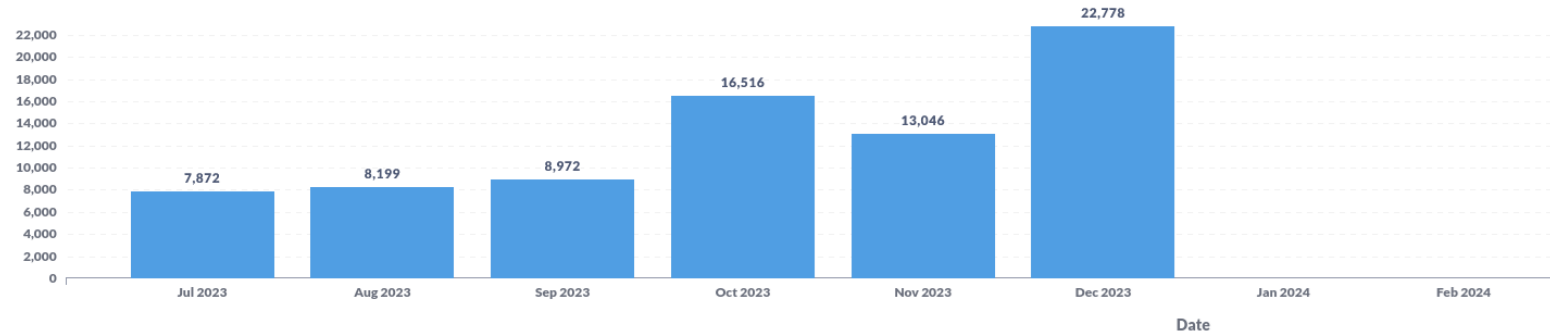
Charts with external metrics

Marketing

Social Media Engagement Rate



Website Traffic



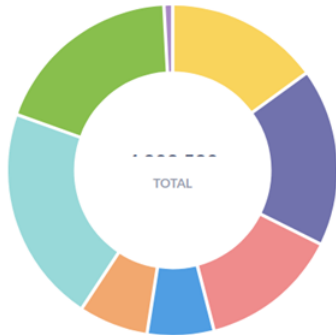
Advanced charts

Dues Summary

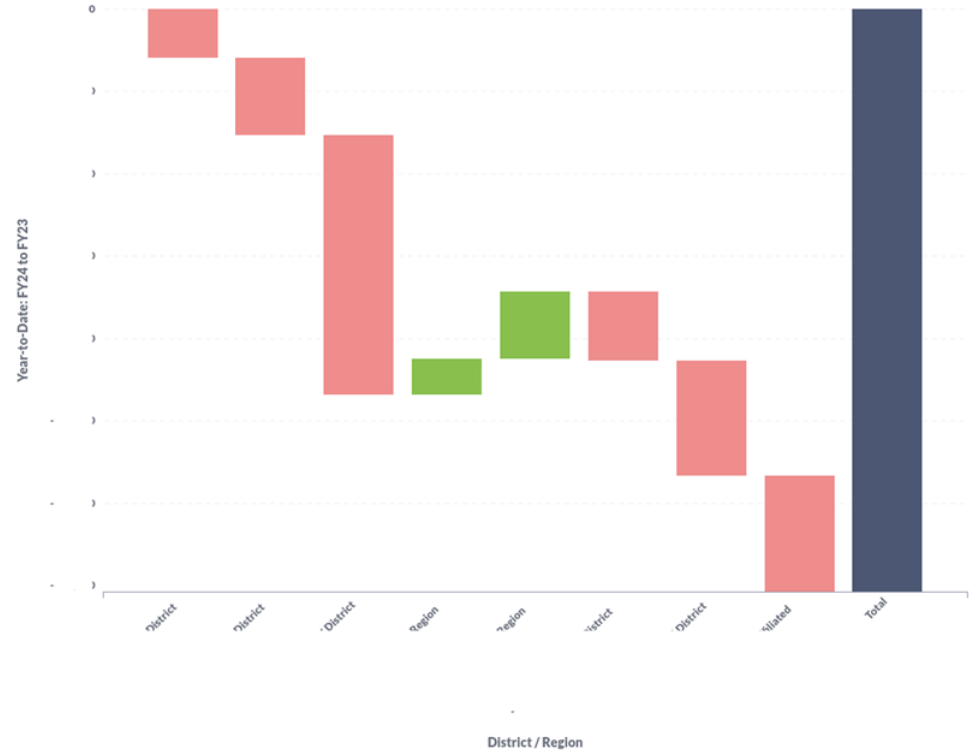
Year-to-Date This FY



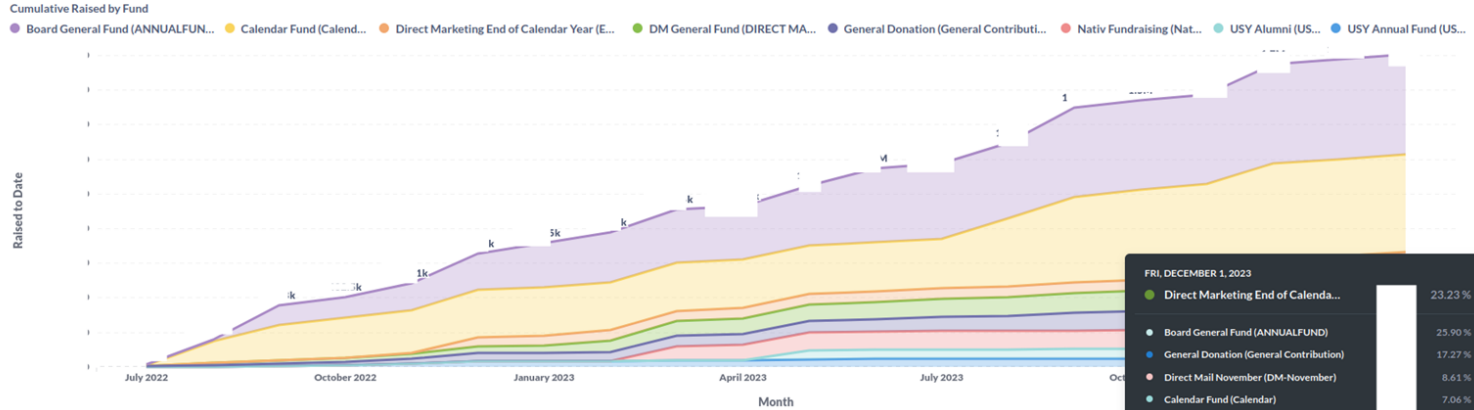
Year-to-Date Last FY



Year-to-Date comparison



Donations by Fund

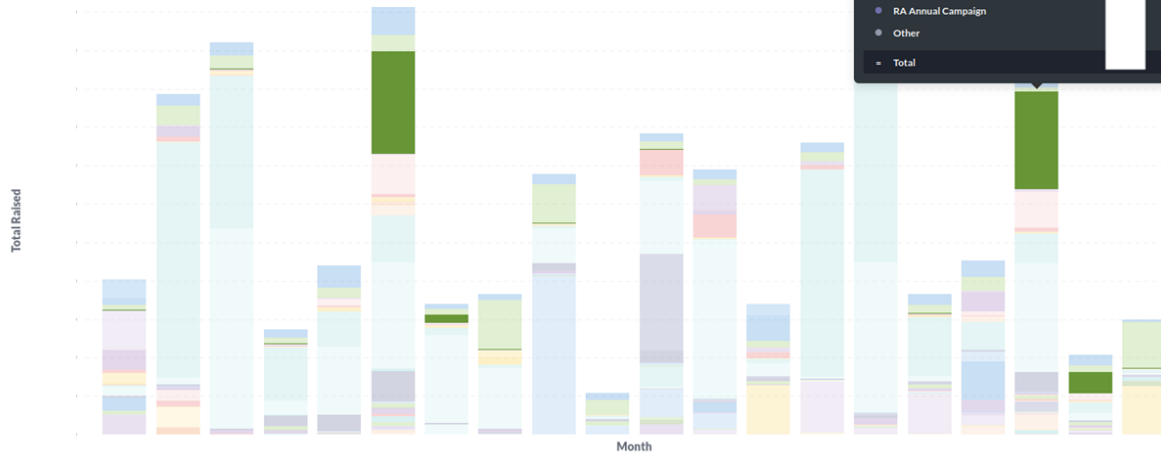


FRI, DECEMBER 1, 2023

Direct Marketing End of Calendar...	23.23%
Board General Fund (ANNUALFUND)	25.90%
General Donation (General Contribution)	17.27%
Direct Mail November (DM-November)	8.61%
Calendar Fund (Calendar)	7.06%
USY Annual Fund (USY)	4.72%
Biennial Convention Registration (BIEN...	3.66%
RA Annual Campaign	2.29%
Other	7.26%
= Total	100%

Total Raised by Fund

- Ad for upcoming USCJ calendar (Calendar Spo...
 - Masorti Kehilla Support (MKS)
 - General Donation (General Contribution)
 - DM General Fund (DIRECT MAIL)
 - USY Security Fund (USY SEC)
 - Direct Marketing End of Calendar Year (EOC)
 - Direct Marketing End of Fiscal Year (EOY)
 - USY City Director - Denver (USYCITYCO)
 - Heschel Fellowship Fund (HESCHEL)
 - Abayudaya Uganda Relief Fund (Uganda)
 - Direct Mail November (DM-November)
 - Direct Mail May (DM-May)
 - Conservative Yeshiva - CY Annual Fund (YESH...
 - Conservative Yeshiva - Daf Shevui (Daf Shevui)
 - Nativ Program (Nativ)
 - Nativ Scholarship (Nativ)
 - LGBT Inclusion Program (LGBT-KESHET)
 - Gil Gordon Leadership Fund (GGLF)
 - Calendar Fund (Calendar)
 - Board General Fund (ANNUALFUND)
 - USCJ Supporting Foundation (USCJSF)
- And 78 more



... 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_c
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(CountryId = 1039, PaymentAmount, 0)) AS YtoDLastY,
         SUM(CASE WHEN PaymentDate BETWEEN '2023-07-11' AND CURDATE() THEN IF(CountryId = 1039, PaymentAmount, 0)) AS YtoDThisY
  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
```

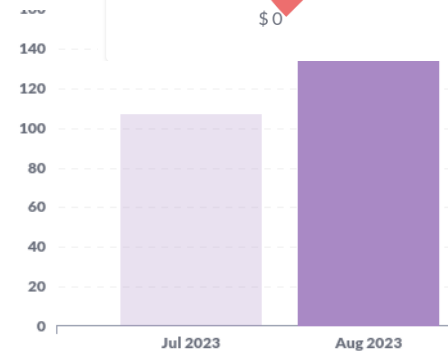
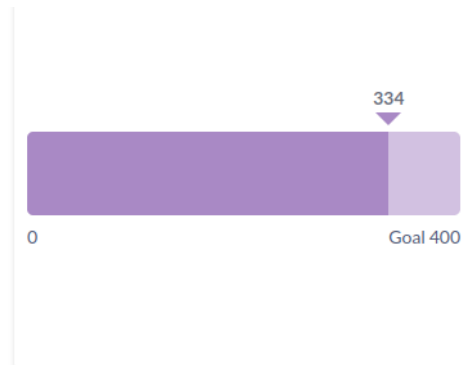
Donations Received

CiviCRM ▾

```
1 SELECT fy.'Month', stats.*
2 FROM (SELECT '2023-07' AS 'Month' UNION SELECT '2023-08' UNION SELECT '2023-09' UNION SELECT '2023-10'
3        UNION SELECT '2023-11' UNION SELECT '2023-12' UNION SELECT '2024-01' UNION SELECT '2024-02'
4        UNION SELECT '2024-03' UNION SELECT '2024-04' UNION SELECT '2024-05' UNION SELECT '2024-06') AS fy
5 LEFT JOIN (
6
7 SELECT LEFT(receive_date, 7) AS 'Date Received',
8        COUNT(*) AS 'Donations Count'
9 FROM civicrm_contribution c
10 LEFT JOIN civicrm_contact ct ON ct.id = c.contact_id
11 WHERE c.receive_date > '2023-07-01' AND c.financial_type_id IN (14)
12        AND c.contribution_status_id IN (1) AND c.is_test = 0
13        AND ct.contact_type = 'Individual' AND ct.is_deleted = 0
14 GROUP BY LEFT(receive_date, 7)
15
16 ) 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.