

Civi Product Implementation Guide

1. Description/Overview of tool

A contact relationship management (CRM) platform that has the ability store, track and segment large volumes of contact data and use it to take actions, like send messages via SMS and email.

2. What types of projects it is useful for/what it's best used for versus similar tools

Civil society organizations, elected officials and political parties are most effective when they can communicate with, understand and respond to the needs of their supporters, constituents and voters. Unfortunately, many of these organizations lack the strategic communications and digital tools for effective outreach and mobilization.

Even when these groups do have full lists of members, or access to the voter registry, they often lack a centralized platform for managing and tracking the history of their interactions with individuals or outside organizations. Consequently, these critical democratic institutions frequently struggle to tailor their mass communication, identify their most important supporters, or track the history of member activities. Members of parliament and other elected officials find it difficult to manage requests from constituents and provide the resources needed for assistance. Political parties waste time and money without a targeted voter outreach strategy. The lack of a central managed system greatly limits the ability of actors from a wide variety of partner groups to understand the who, what, when, where, why and how of effective strategic outreach and communication.

Civi is best situated for users who are looking for a free solution, are looking to do somewhat complex and detailed contact management and communication, and are comfortable with navigating new online platforms without extensive guidance.

3. Language for proposals/General pitch of the tool

Every organization is more effective with a contact management database enabling them to build lists of people and communicate effectively with them. Civi helps organizations keep track of their audiences in a centralized location, replacing paper files, scattered spreadsheets, or numbers from the boss' cell phone. Groups can know who their contacts are, as well as what they do, why they are important and how to most effectively engage with them. Combined with Civi's mass email and SMS capabilities as well as its simple yet powerful searchability, these

tags, groups and other identifying features mean that users can find and organize the right people around relevant issues.

Civi's event and campaign hosting and management attributes, in combination with the ability to categorize and describe contacts, mean that organizations can quickly and easily find who to invite to specific events or organize for a given campaign. Plus, the ability to keep activity logs helps Civi users gain and keep valuable information about their interactions and history with individual contacts.

Although all organizations can make use of some of Civi's more central features, different groups and organization types can use the power of Civi in very different ways.

4. Budget for implementing

Below is a template for budgeting for Civi:

<https://docs.google.com/spreadsheets/d/1p3KJT4WIDsjp098HoVx61kFsAfukFYntIjwQJaevLk/e/dit?usp=sharing>

5. Technical capacity required

For NDI staff and partners, NDI is able to host Civi sites. Civi users will simply need to be comfortable navigating a Drupal website, performing tasks such as uploading csv files and editing content. To host Civi yourself, you will either need to engage with a [vendor who can host Civi for you](#), or have internal staff who can support hosting a Civi site. Internal staff will need to be comfortable with creating a server and deploying an application and database on there, and specifically should be able to manage a Drupal website.

See more information here:

https://docs.google.com/document/d/1S_GxEjI_3R6j7wMn1kFja5WE8W2pjyWAX0OCytjOhlg/e/dit?usp=sharing

6. Level of effort to implement

Below are two training models for Civi, with the amount of time required for each:

<https://docs.google.com/document/d/1D28zS1L39YQirSvx9FAWddej5PsYjWc1qIU24zrg-gY/edit?usp=sharing>

7. Contextual Considerations

a. Cybersecurity

Civi is an open-source software, with various contributors who identify and patch security vulnerabilities. You should make sure that Civi security patches are being applied regularly to your Civi site. In addition, general Drupal security updates and system updates must also be applied.

The detailed personal information about contacts, supporters, donors and volunteers held in Civi can be highly sensitive. If your adversaries are interested in this sort of information, breaking into your Civi provides it all for them on a silver platter. If the consequences of that sort of exposure could be dire for the individuals in the system, please contact the NDItech team for advice on additional security measures.

Civi provides the ability to limit site privileges based on user role. As such, the typical Civi site will have a general permissions structure along the lines of Site Admin (controls all aspects of the system), Content Admin (able to create, edit and delete content as well as perform communications functions), Staff member (able to create content on the site), and, if desired, general public (to fill out surveys, sign up for mailing lists and log personal contact information). Civi can also be configured with a concept of regional permissions. The Provincial Coordinator, for example, can add, delete, edit and view people from their region, but not the next one over.

In a hostile environment, the Civi server could face direct hacking attacks, DDOS attempts or blocking. If hosted on DemCloud, NDI will attempt to mitigate those threats as much as possible, but consult closely with the team if the environment seems threatening. These considerations are only a small subset of possibilities; if your program is in a sensitive security context, please engage in a holistic risk assessment process to determine the types of threats that your participants may face.

b. Languages

Civi is available in a number of languages. The full list of languages and the extent to which each translation is completed can be found here: <https://www.transifex.com/civCRM/civCRM/>. The tool is close to fully translated in Dutch, English, French, Hungarian, Italian, and Spanish. It is also at least two-thirds translated in Arabic, Danish, German, Indonesia, Japanese, Macedonian, Norwegian, Persian, Polish, Portuguese, Russian Serbian, Turkish, and Ukrainian.

c. Other limiting factors (not designed for closed societies, etc)

Civi is useful for organizing in both open and closed sites. When working in closed societies, the cybersecurity considerations mentioned above should be taken very seriously.

8. Any additional information/materials (links to user guides/technical guides, demo, etc)

CiviCRM has a relatively large open-source community and material developed for the tool.

- The main Civi website is <https://civicrm.org/>
- The CiviCRM user guide can be found here <https://docs.civicrm.org/user/en/latest/>
- NDI hosts a demo site at <https://civideo.demcloud.org> (log in at <https://civideo.demcloud.org/user>)