



Civi

Powerful, flexible contact management
and citizen engagement
Created by CiviCRM LLC



Civi Powers Contact Management and Communication

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.

Why Would You Use Civi?

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. For that reason, NDItech developed three different "flavors" of the Civi DemTool: CiviParty, CiviSociety and CiviMP. Each comes with pre-loaded groups, tags, events, reports, contact types and custom dashboards to suit the needs of these common partners. Each individual site can be further customized to specifically fit your partner's needs.

Political Party Membership and Campaign Management- CiviParty

Campaigns are limited by time, money, and volunteers. Targeting voters and communicating effectively with supporters help parties make the best use of these resources. Using Civi, a political party can pull up a list of all its contacts that they consider to be likely supporters—for example, youth voters located in a provincial capital, women over 60, or rural residents interested in education. Additionally, Civi, which collects information on gender and age,

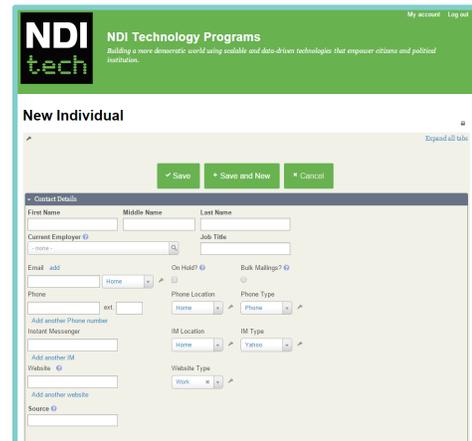
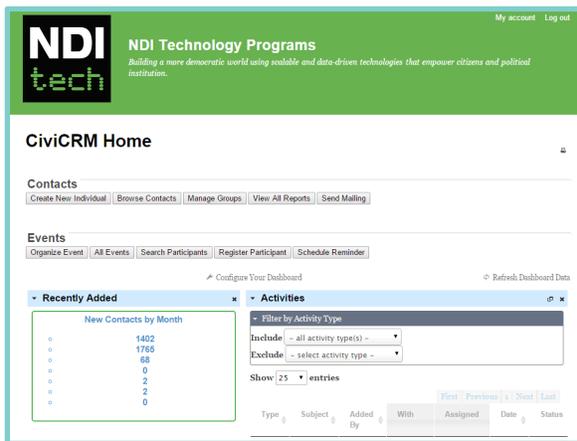
can be a useful tool for parties looking to broaden their base or support more women or youth candidates, as it can collect the names of active female or youth party members. With such targeted lists, parties can better engage citizens through phone calls, door knocking, email blasts or SMS communication.

Community Organizing Contacts and Communication - CiviSociety

A civil society organization looking to organize a rally on education, for example, can see who has been involved in education campaigns in the past or who is likely to have school-age children. Such targeting allows the organization to directly include these folks in future campaign efforts and keep track of what skills these contacts might have that can help contribute to the campaign's success. In this example, Civi can provide not only valuable metrics for campaign logistics, but it also better informs a more effective engagement strategy.

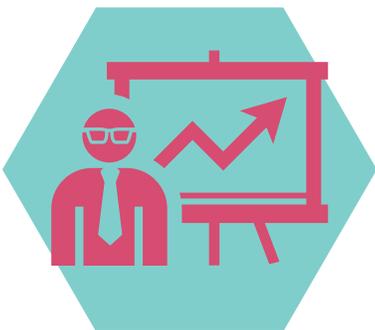
Legislative Casework and Constituent Communications - CiviMP

Members of parliament and other elected officials can connect with citizens and manage case assignment, workflow and follow-up, all of which can be coordinated through Civi. In addition to the case management itself and its ability to improve governance and service delivery, helpful metrics and reports on the issue areas that attract the greatest number of constituent complaints or requests can help an MP or party leadership focus on the most important topics relevant to the voting public.



Past Use Cases

In the past year, more than 50 Civi sites have been created for NDI's partner programs and used by political parties, election monitoring groups, Members of Parliament, and other civil society organizations around the world. Civi has been successfully deployed in Ukraine, Iraq, the Democratic Republic of Congo, Uganda, Burma, Macedonia, and Mexico. CiviCRM is widely used in the United States and Europe, with over 15,000 deployments.



Technical Requirements

Most organizations already have contact lists, but those lists are perhaps widely dispersed through different databases, spreadsheets, file cabinets, cell phones, etc. It is a significant project to aggregate, clean, de-duplicate and upload these contacts. Expect to spend significant time—days—in this process.

Connecting Civi to an email provider requires configuring the default email processor, Mandrill, with information for an institutional email account, which may require modifications to the organization's domain name system (DNS) records. Similarly, to setup SMS messaging, the organization will need to have an account with an SMS aggregator like Twilio or Clickatell.

If an organization wishes to host their own version of Civi, they will need to have the capability of configuring, securing and managing a basic Linux/Apache/MySQL/PHP server running the Drupal content management system and Civi on top. This is a fairly high technical bar; organizations wishing to host on the DemCloud software-as-a-service platform—and be spared the additional effort—should contact the NDItech team.

User Considerations

Organizational contact management is powerful but time-consuming, and requires a commitment to new internal processes. A potential Civi program should think about whether staff and leadership are ready to make the effort needed to manage, maintain and organize their contacts. Data decays with time. People move, get new cell phones and change jobs; unless you work to maintain it, your information will become making your information less accurate and less valuable. This takes discipline.

Searching for and entry of contacts is relatively easy; people with a basic proficiency with computers should be able to learn it with a quick training. A Civi manager will need more sophisticated skills to manage uploads and downloads of contact lists, create new users, and design complex searches.

Voter targeting, constituent casework management, or more sophisticated applications of Civi are best introduced through an in-depth training program where the political goals—e.g., voter outreach to win a campaign, or constituent service delivery as an important role for an MP—are the core content and Civi is the tool used to demonstrate and implement the program goals.

If Civi is used for mass communication with citizens, it is important to have a holistic communications strategy, thoughtfully developed messages and a good idea of how your audience can best be reached.

Security Considerations

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.



Considerations for Women & Marginalized Populations

As a web site Civi users need regular access to the internet, though intermittent or slow connectivity is fine. Importantly, the citizens targeted by the organization do not need to have internet; simply being able to track them for contact via phone or in person is valuable. Civi's bulk text messaging abilities provides a useful avenue to reach communities, especially poor women, who are less likely to have internet access. As with most web applications, Civi may be difficult to operate for persons with visual disabilities.

If the organization is tracking contact information or personal data on socially marginalized groups such as LGBTI communities the security ramifications of data theft become that much more significant.

Translations

The Civi DemTool is currently available in English, Ukrainian, Arabic, French, Spanish, and Russian, with training documents and user manuals in English. The CiviCRM community is actively engaged in translating the strings, so Civi will be partially available in many other languages. All can be translated into additional languages as needed with modest funding support. The tool will undergo continual maintenance and further development, and customization is available based on new feature requests or unusual country contexts. We can also work with you to translate the tool and manual into additional languages.



Funding Considerations

While the implementation of the Issues DemTool platform is straightforward, programs should think through the following activities and budget appropriately for the related staff time.

Initial Deployment

- Program strategy and setup times
- Collection, normalization, deduplication and uploading of contacts
- New language translations, if necessary
- Development of any new features required
- Training on use of the system for all relevant organizational staff
- Advanced training on managing and maintaining the system
- Training on campaign management or constituency casework management
- Setup and configuration of SMS or email gateways
- Training on email or text message outreach and communication strategies

Ongoing Care and Feeding

- Staff time for data management
- Costs for email or text messages

What Support Does NDItech Offer?

In addition to the technical management, security and version upgrades and hosting, NDItech has a user manual and training (in English) to help support the implementation of the tool. NDItech can also further customize the look and functionality of your Civi site to fit your needs.

For interested partners, NDI staff can assist in administering Civi by managing citizen submissions, content moderation, and advertising or digital outreach efforts. NDItech can provide hosting, technical support, and security for organizations through the DemCloud software-as-a-service platform.

If desired, NDItech can assist with strategic consultation, training, graphic design, implementation assistance or ongoing contact maintenance.

DemTools are a set of open source, web-based software applications designed to help NDI partners solve challenges facing their community.



DemTools
by NDItech

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