

CiviCRM Government for Large Multi-Site



Bluebird

Case Study: NYS Senate

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outline

- background
- implementation
- support/ongoing development
- pain points
- government nuances
- impact on CiviCRM
- q&a

landscape

- 62 senate districts
 - system for tracking interaction with district constituents, sending mailings
- approx. 60% used OMIS
 - mainframe/green screen
 - keyboard only
- remainder used self-built solutions
 - Excel/Access
 - custom built

objective

- replace OMIS with modern solution
- achieve buy-in across all districts
- pursue open source solution, if possible
- selection process included review of 30+ CRMs, both open and closed
- finalists: CiviCRM and Salesforce

team

- Rayogram
- Lighthouse Consulting & Design
- CiviCRM Core Team
- NYSS CIO
- NYSS STS

size/structure

- 62 districts + 30 committee/leadership instances
- 150k-250k contacts per instance
- hosted in-house; everything behind firewall
- multi-site: single codebase, separate dbs
- ldap authentication



implementation

load testing

- prior to full contract
- prove scalability to millions of contacts
- populated dbs/ran automated tests using JUnit
- identified weak areas in code and db

load testing: lessons learned

- difficult to simulate real life usage
- production environment not identical to load testing environment
- rapidly changing software
 - load testing on core CiviCRM
 - production on later version with extensive customizations

discovery

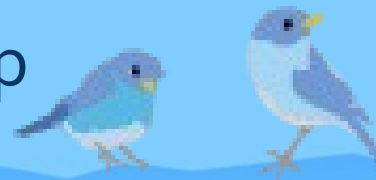
- 6+ weeks
- functionality-targeted meetings
 - primarily with CIO/STS/training staff
 - 2-3 meetings with district staff
- 70+ pg document: blueprint for development
 - specific detail
 - version-based (1.0, 1.5)

discovery: lessons learned

- you can never be detailed enough
- scope creep where understanding of functionality was vague
- scope creep where assumptions were made
- complete discovery before committing to development timeline
- scope creep is inevitable. important to come to an understanding of *how* we will handle it.

branding: bluebird

- Senate-specific branding
 - perception of ownership
 - visual identity



user interface

- goal: streamline specific use cases
 - advanced search
 - editing contacts
- rebuilt CiviCRM templates to be more css friendly (committed to core)
- theme built to accommodate usage
 - built “wrapper” around CiviCRM containing CiviCRM helpers

Find Contacts

Find Anything!

CREATE

Good Morning,
Bluebird

▶ ADVANCED SEARCH

Custom Search

Reports

Manage

Administer

[Set Job#]

Mr. John P. Doe

Actions

Edit

Delete Contact

Summary

Cases 0

Activities 0

Relationships 0

Groups 0

Notes 0

Tags 0

Change Log 1

Mr. John P. Doe

Nickname	Johnny
Contact Source	Albany Office Visit
Contact Type	Individual
Individual Category	Non-district Individuals

Home Address	45 Main St PO Box 123 Albany, NY 12204-0000 United States
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▶ District Information

Home Phone	518-123-4567
Home Email	jdoe@doe.com

▼ Additional Constituent Information

Active Constituent?	Yes
Interest in Volunteering?	No
Friend of the Senator?	Yes
Voter Registration Status	Registered
BOE Date of Registration	

▼ Attachments

Gender	Male
Preferred Language	English (United States)

Date of birth	March 15th, 1978
Age	32 years

Professional Accreditations	
Skills/Areas of Interest	
Honors and Awards	
Record Type	

▼ Communication Preferences

Privacy

instance management

- created series of shell scripts to quickly/easily:
 - create new instance (based on template)
 - destroy instance
 - copy instance
 - manage: clear cache, etc.
- instance:
 - db and site files structure
 - OMIS import

multi-site

- initially based entirely on Drupal multi-site
- evolved to dynamic url/resource resolution method:
 - modifications driven by NYSS
 - single bluebird config script defining all instance variables (subdomain, ldap groups, import data files, system email, etc.)
 - initially impacted ability to use Drush

training

- written documentation (basic)
- train the trainer/train support
 - training sessions with STS
 - ongoing high-level support
 - periodic targeted training
 - review internal training documents

beta testing

- two districts selected for beta testing
 - difficult to make that constructive
 - bugs/frequent updates would stall the process and discourage testers
- relied more on training/support staff for aggressive QA testing

progressive rollout

- over the course of 4 months
- districts only given access after attending training



extending feature set

- CiviMail
 - Drupal rules for workflow
 - create/schedule/approve
 - communicate during each "hand-off"
- Problem: how to handle bounce/images/data collection/click through
 - Squid
 - email signup data stored in Drupal



support
ongoing development

support

- Icd/rayogram: retained for support/development
- seeking to build internal expertise
 - involving Senate staff
 - sharing solutions in detail

support

- production bugs
 - policies/procedures
- periodic BOE imports/merges
 - custom export/import
- 3rd party imports

issue tracking

- redmine
 - bugs
 - features
 - support
 - version management

ongoing development

- rolling out a new version
 - versions/revisions
 - files + custom db upgrade script
- three “environments”
 - production
 - development
 - test
- GIT repository



pain points

pain points

- performance
 - code/db
 - identifying location of bottlenecks
 - effects of concurrency
- bugs
 - through each version, spending several weeks on QA testing
- meeting expectations



government nuances

government

- large, low-tech user base
- highly customized
 - streamlined
 - refining help text
 - removing unused tools/references
- politics
 - changing leadership
 - distrust



impact on civicrm

community

- viable large-scale implementation
- opening (or expanding) new government sector
- high-profile user
- much of development returned to core
 - decrease future development costs
 - increase ease of upgrades

code contributions

- UI overhaul
- performance improvements
- free text tagging
- Drupal rules integration
- lots of minor bug fixes/improvements



Q&A