



Project Status Report

Project Name: Information Management Task Force: CivicCRM Implementation

Date: 5/11/2013

Status Summary: The Information Management Task Force is in place and in the process of determining how to allocate members to project tasks. We currently have a functional CivicCRM environment up and running for evaluation and a data evaluation and cleansing effort has begun.

Accomplishments this Month
Ellen provided central access to CivicCRM materials and project documents (including an issues list) to the team.
Each team member reviewed CivicCRM supporting materials to get familiar with the system.
Ellen granted various levels of access to the system for exploration/testing purposes to the team and Dan Woodard, Computer Services Coordinator.
The team began entering contact data into the system for test purposes, using a very small number of organizations and team members as examples.
Jim backed-up the system and the database and began troubleshooting issues with restoring to another server.
The team conducted a preliminary data evaluation based on a dBase export and determined that further data cleansing is required before moving data into the new system. John investigated the feasibility of using cleansing scripts, but recommends manual evaluation/cleansing as the best approach. Karen agreed to assist with this task.
Renata agreed to take on more administrative project management duties to free Ellen up for technical tasks.
The team began evaluating potential security risks: Ellen disabled our admin user based on information from Jim about attack trends. John Zhang made some recommendations for areas to explore further before we implement.

Items Requiring Board Input

Evaluation of NSCS Privacy Policy and security needs.

- **End Goal:** determine whether the system’s security and storage method for sensitive personal information is sufficient both from an individual’s perspective and for NSCS liability should we have a breach.
- **Immediate need:** Determine which of the following options to pursue.
 1. **Do nothing.** Implies that the Board feels the existing privacy policy is sufficient for the time being, password protection is adequate to protect against inadvertent or malicious access, and the risk of being sued is miniscule.
 2. **Cautiously proceed.** Assign a Board member to be an advisor to the team for security issues, but allow the team to proceed with project. Implies the Board recognizes the importance of the issue and that there may be some risk involved that hasn’t been evaluated or mitigated. But the Board perceives that the risks in proceeding are not great enough to delay delivery of a more strategic technology to support NSCS operations.
 3. **Place implementation on hold.** Assign a Board member to be an advisor to the team for security issues, and instruct the team to avoid storing consumer data on the web until the risks have been evaluated/mitigated. Implies the Board recognizes the issue as highly important and is uncomfortable in taking any risks that the consumer data might be hacked, which could lead to financial consequences. (See below for impact).

Future Steps

Renata and Ellen to meet for transfer of responsibilities and project planning purposes.

Continue data evaluation and determine action plan for cleansing.

Continue evaluation of CiviCRM functionality.

Further refine task force members’ roles and responsibilities to break out project work.

Work with Board representative(s) to revise privacy and security policies/guidelines.

Determine what system modifications and back-up procedures are required for compliance with updated privacy and security policies/guidelines and potential costs.

Impacts of project hold:

Delayed benefits

- High operational cost for time/effort on dbase tasks
- Small number of people with access (difficult to divide and conquer)

Risks

- Very little documentation on dbase – troubleshooting issues involves contacting people who may remember how it works and combing through emails
- No audit trail – potential for accidental data loss