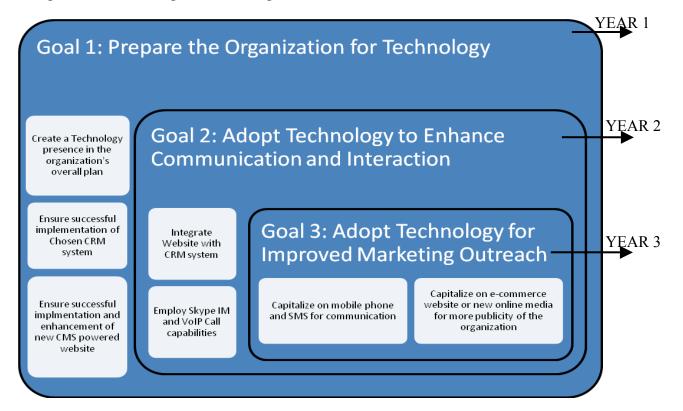# VI. RECOMMENDATIONS

. Vision

The future of NCJW should be one that successfully attracts new and young blood into the organization, by continuously harnessing and enhancing the right technologies to complement its administration and effective communication with its members, community and the public at large. Effective communication further improves the organization's responsiveness to opportunities and service quality to its members and community, with a greater outreach to those who support and benefit from its mission.

The attainment and sustainability of the vision requires a continuous effort in the implementation, maintenance and investment in technology. Since the advent of information technology, its adoption by various industries has spurred changes ranging from operational efficiency to new business opportunities and even the transformation of the whole industry.

These goals are forward-looking of what the organization should do to prepare itself and its employees to embrace new technological innovations in the short term. They have to be re-evaluated periodically as technology, organization, and expectations of community and members change. In the long term, the organization should have visions of its future technological capabilities due to the dynamic nature of the environment.

The goals and the strategies to acheving them are illustrated below:

YEAR 1

Goal 1: Prepare the Organization for Technology

YEAR 2

Create a Technology presence in the organization's overall plan

Goal 2: Adopt Technology to Enhance Communication and Interaction

Ensure successful implementation of Chosen CRM system

Integrate Website with CRM system

YEAR 3

Goal 3: Adopt Technology for Improved Marketing Outreach

Ensure successful implmentation and enhancement of new CMS powered website

Employ Skype IM and VoIP Call capabilities

Capitalize on mobile phone and SMS for communication

Capitalize on e-commerce website or new online media for more publicity of the organization

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B. Goal 1: To ensure a successful implementation of chosen technologies

As described by the Executive Director, NCJW's technological knowledge and capabilities are still in the primary level. Although the management is ready to embrace technology, major decisions regarding technology purchases are maintained by the board. Technology is never a focus or component in the organization's overall plans and strategies for its future. There was no IT budget, plan, or even control over IT before the consulting project (evident from the transition risks from Lisa and Scott back to the organization). The management should focus on building a strong case for technology, in order for the board to adopt it into the overall goals and strategies of the organization. This can be done by ensuring its implementation of selected CRM adoption strategy and Joomla CMS presents positive results within the first year of implementation, proving that the organization has successfully managed the potential risk brought forth by the IT responsibility transition task. With better information management and reporting capability, its fundraising potential is enhanced. After top management buy-in to the positive results, IT could then be adopted timely and successfully for the organization to respond to new opportunities.

In order for the organization's IT knowledge and capability to be sustainable, the organization must always be ready for new technologies, thus, this goal spans for the whole of the next 3 years.

Benefits and Justifications

As mentioned in the previous section, IT has brought forth many improvements over years for organizations in various industries. For NCJW, the successful adoption of IT will greatly improve its operational and program administration by eliminating data redundancy and inconsistency. Information update is done only once into a single database and retrieve easily from the same location. The following improvements will be observed:

1. Reduction in time taken for overall operation and program administration
2. Reduction in time taken to respond to board and management information needs
3. Improvement in data accuracy
4. The organization is less reliant on IT experts for normal technical incidents. Able to solve 2 in every 3 problems via documentation
5. Reduction in cost required to serve its donors and conduct its programs.
6. Improvement interaction and communication with members
7. Improvement in membership over the first year

Implementation Strategies

The achievement of this goal is dependent on how well the organization is able to continue the efforts initiated during the consulting engagement. It focuses on ensuring that the organization is successful in the revamping its website and implementing the selected CRM system, with subsequent technological planning by the technical committee, to prove the importance of IT (as illustrated in the figure above). The detail implementation steps for these strategies are presented in a timeline, together with the resources required at each stage.

Implementation Plan for Joomla powered CMS system and Salesforce or DonorPerfect CRM

Date	Tasks	Resources	Cost
Dec	**Salesforce Database:** • Sign up for Trial to Salesforce Non-Profit CRM and obtain free license (fax 501c3 document) • Clean existing database and export them to Comma Separated Files (CSV). • Complete customizing data fields and workflow • Import data from CSV files to Salesforce CRM system • Test the new system in a parallel manner. Run and operate on both systems at the same time.	Bonnie (Internal) Cheryl (Internal) Jim (External) *or* External implementation vendor	20 more work hours 30 more work hours 40 work hours in total Approx $3K
		Salesforce user and training guides[1]	Free
		Salesforce technical support	Free
		Data and Process documentation produced in this project	Free
		Bonnie (Internal) Cheryl (Internal)	10 more work hours 20 more work hours
		DonorPerfect data migrator (External)	Approx $3K
		Data and Process documentation produced in this project	Free
	DonorPerfect Database: • Provide customization request • Provide data from existing database • DonorPerfect will customize the database and help in data migration	Drue (Internal) Bonnie (Internal) Susan (Internal) Cheryl(Internal)	5 more work hours 5 more work hours 5 more work hours 5 more work hours
		Joomla documentation and discussion forum[2]	Free
	Website: • Complete template customization and static information migration from existing website to new website with enhancing discussion board • Executive, Director and President and Office Manager trained on how to use discussion board		

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[1] Salesforce resources and the "help and documentation section" when you are logged in to the free trial of the actual system

[2] Joomla resources (Help, Forum, Documentation)

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Feb	Database: • Complete data migration and testing from MS Access to Salesforce Non-Profit CRM or DonorPerfect • On the system training on how to use the new system. May still want to run the old system and new system in parallel during the learning phase. • Document improvements in terms of time taken to complete tasks, redundancy reduction and occurrences of errors between old and new database system. Website: • Debut of new website and closure of the existing website • Implement more features: Events Calendar, RSS Feed, linkage to Flicker and Youtube, online donations.	Bonnie (Internal) Cheryl (Internal) Jim (External) Salesforce user and training guides Salesforce technical support *Or* DonorPerfect training guides[3] Drue (Internal) Joomla documentation and discussion forum	10 more work hours 30 more work hours 20 work hours Free Free 25 more work hours Free
May	Database: • Complete switch from MS Access database to new CRM system • Create workflow documentation for the operating on the new system, to be added to the technical documentation. Website: • Create workflow documentation for maintaining the new website, to be added to the technical documentation. • Constantly updates web content	Cheryl (Internal) Jim (External) Salesforce user and training guides Salesforce technical support DonorPerfect training guides[4] Drue (Internal) Joomla documentation and discussion forum	8 more work hours 8 work hours Free Free Free 10 more work hours Free
Nov	Database: • Re-evaluate system for fit with the organization (decision to continue or switch) – more for Salesforce CRM • Implement add-on modules from AppExchange for events management and volunteer management (Salesforce CRM) Website: • Implement new features available, integrate with Facebook and MySpace.	Cheryl (Internal) Jim (External) Technical Committee Documentation will come along with the module Drue (Internal)	6 more work hours 20 work hours 2 work hours Free 10 more work hours

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		Joomla documentation and discussion forum	Free

Implementation Plan for creating a Technological Conducive Organization

Date	Tasks	Resources	Cost

Dec	• Complete all remaining pieces in the technical documentation
	   o User guides for technical resolution
	   o Technology related policies
	   o Future technology meetings
	• Present case to Board for including a IT Budget component in the annual Budget
		Technical Committee	5 work hours

Recurring Technology Committee meeting	• Review changes in Technical Documentation • Re-evaluate Technology (Once a Year) • Discuss possible/potential technological implementations • Decide on hardware/software purchases • Develop technological proposals to the board	Technical Committee	2 work hours per meeting
Recurring Technology Board meeting	• Review Technological performance and need for the organization • Adjust budget and approve purchases when necessary • Discuss the role of Technology in organizational strategy and plan	Board	0.5 work hours per meeting

Outcomes

Areas of impact	Outcome (Positive/Negative/Neutral)

Organization	Positive.
	  o Improves technical knowledge of the organization
	  o Improve cost efficiency of overall organizational processes
	  o Although higher investments are need in technology (new server, third party service, new CRM system and etc). But returns on investments will be higher too

Programs	Positive.
	  o Increase responsiveness to program needs
	  o Improve program management

Staff	Positive.
	  o Improves technical knowledge of the staffs
	  o Always informed and updated with new technical opportunities
	  o Increase efficiency of work processes
	  o Reduce work redundancies
	  o Higher motivation and value in work
	  o Learning cost – work overtime
	  o Job skill requirement for new hires will rise and therefore salary demand is expected to increase

Technical Environment	Positive.
	  o Creates a more conducive environment for capitalizing on advantages and benefits brought forth by technology
	  o Increase in value and importance in the organization, but more time and resources are needed to manage IT as it gains importance in the organization

Technology	Positive.

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management	o Reduce dependency on a single individual's knowledge o All technology management information are documented and easily accessible
Technology planning	Positive o More pro-active technological planning and upgrades
Internal and External communications	Positive. o More targeted mailing efforts with better reporting capabilities o Increase interaction with stakeholders via the website o More dynamic content (more constant updates) on the website
Information Management	Positive. o Information will be more effectively and efficiently maintained in a single data store with lesser data inaccuracies, faster data entry and retrieval, and more comprehensive reporting capabilities. o Better data analysis capability

C. Goal 2: To adopt technology for enhancing the organization's ability to communicate and interact with its stakeholders

Once the organization is familiar and successful with the technologies that it adopted in the first year, it will have a larger capacity and readiness to adopt more available technologies that enables better interaction and communication with external stakeholders. This effort is likely to span over one year, from the 2nd year to the 3rd year based on its complexity.

The focus is to sustain the organization's interest and acceptance of IT by capitalizing on other technological innovations or products that are available, to further improve communication with its stakeholders. This includes better management of meetings and other communication efforts, and higher availability and accuracy of services and information.

Recommended improvements and technologies needed to fulfill the vision include integration of website with database, the adoption of Google Calendar or equivalent scheduling technologies, Skype Voice over IP and Instant Messaging Service.

With database and website integrated, data can flow to and fro from each platform. Thus, the organization is able to display real-time information on the website and allow real-time registration for membership and events. This availability and ease of performing various tasks without having to make a call or mail a response result in a higher encouragement for member, volunteers and donors to participate in events and advocacy efforts.

Next, scheduling software will be useful in establishing meeting date and time for the management and staff in the organization. The reason I choose Google Calendar is that it is free to get a Google account, compatible with Blackberry used by the President and Executive Director and is accessible via web connection to the internet.

Lastly, Skype allows for two benefits, firstly, instant messaging capabilities across the organization (e.g. between DDB and Anathan House). This allows for faster response to small queries and is very effective during times when the phone lines are busy. Secondly, staffs are able to make use of the voice conferencing or video call function to conduct online virtual meetings when they cannot be physically present for meetings

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Benefits and Justifications

With these improvements, the benefits that will be observed are:
1. Increase in efficiency for organizing and facilitating meetings with more than 2 parties
2. Reduction of cancelling and reorganizing of meetings due to physical unavailability of participants
3. Increase in member and volunteer participation in events
4. Increase in membership registration

Implementation Strategies

The detail implementation steps for these strategies are presented in a timeline, together with the resources required at each stage. As more innovations are developed each day, there may be other tools that are more viable that the suggested ones in this recommendation, therefore, the tools should be re-evaluated at the time of implementation. Thus the software and implementation plan below may be revised due to changes in technology or technical capabilities or resources in the future.

Date	Tasks	Resources	Cost
Jan 2010	Web database Integration: (Salesforce) • Implementation Phase 1 • Implement events and online membership registration and payment module using Plone[5] CMS App Extension	Bonnie (Internal) Drue (Internal) Salesforce API Salesforce AppExchange	5 more work hour 20 more work hours Free Free
	Web database Integration (DonorPerfect CRM) • Implementation Phase 1 • Implement events and online membership registration and payment module using Joomla! forms extension • Daily import data into CRM via the import facility[6]	Bonnie (Internal) Drue (Internal) Joomla documentation and discussion forum	5 more work hour 20 more work hours Free
	Google Calendar • Register for Google mail account at Google.com • Enter schedule in Calendar • Sync Calendar with other staff • Sync Calendar with Smartphone (Blackberry)	Drue (Internal) or Jim (External) Calendar users Google Calendar user guides[7]	5 more work hours 5 work hours 2 more work hours Free
April	Web database Integration: • Implementation Phase 2 • Implement online donation module. (e.g. for one-time, honorium and memorial donations)	Bonnie (Internal) Drue (Internal) Salesforce API Salesforce	5 more work hour 20 more work hours Free Free

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[5] As it would be more difficult to integrate Joomla! with salesforce backend database due to the knowledge required on API and PHP programming, I suggest that the organization make use of Plone to develop its online forms as it has a direct integration with Salesforce, eliminating the need for any coding. The Joomla! site can then be linked to the Plone pages for member or events registration functions.

[6] DonorPerfect has a import utility that can import values from CSV files into the database. Therefore, registration recorded by Joomla! forms into the database can be exported to the CSV file and re-imported into DonorPerfect for update.

[7] Google Calendar User guides

[8] Skype help and user guides

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	*** Same steps as phase 1 for either CMS	AppExchange Joomla documentation and discussion forum	Free
	Skype VoIP • Install Skype into user machines • Register using organization's email or personal email • Register a Skype number for receiving incoming calls • Call to other Skype users or to a land or mobile lines	Drue (Internal) or Jim (External) Skype user guides[8]	4 more work hours 4 work hours 1 more work hours Free
		Skype call to land line charges	Charges varies for calling to different regions
	** If the organization is still using Salesforce, there is an application extension for it to sync with members records.	Salesforce App Exchange	Free
August	Web database Integration: • Implementation Phase 3 • Implement online event registration and payment and volunteer registration *** Same steps as phase 1	Bonnie (Internal) Drue (Internal) Salesforce API Salesforce AppExchange Joomla documentation and discussion forum	5 more work hour 20 more work hours Free Free Free

Outcomes

Areas of impact	Outcome (Positive/Negative/Neutral)
Organization	Positive. ○ A more tech savvy organization ○ Improve overall organizational image as a technologically pro-active organization ○ More time and effort is needed by the staff to implement these solutions, therefore, the organization may have to compensate them for the extra time taken.
Programs	Positive. ○ Increase responsiveness to events and advocacy efforts ○ Improve program management
Staff	Positive. ○ Increase efficiency of work processes ○ Reduce work redundancies
Technical Environment	Positive. ○ Increase in value and importance in the organization when benefits are explicit and visible ○ More sophisticated use of technology
Technology management	Neutral ○ More documentation and management efforts needed
Internal and External communications	Positive. ○ More real-time content (more constant updates) on the website ○ Higher frequency of intra-organizational communication
Information Management	Positive.

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D. Goal 3: To enhance outreach through technology

After the organization is able to better manage communication and thus a better relationship with its stakeholders, it will be time to increase the organization's presence in the public and enhance its interaction and outreach through the adoption of more or better technologies (there may be newer technologies at that point of time) to enhance involvement of these stakeholders.

With enhanced capability in constituent relationship management and external communication and interaction. The organization can embark on an awareness and membership increment journey, to attract more members, more involvement and therefore more services and benefits to the community.

The technology proposed in this section includes free Short-Messaging-System software (mobile messaging), Frontline SMS system that allows the organization to send out mobile messages to inform or remind stakeholders of events, one or two days prior to events or even send out last minute deals for members who have signed up but has not attended the Designer Days Sales event to encourage their attendance. In addition, the organization currently makes use of direct mailing of invitation card for volunteers to help out during certain events. These cards needs to be mailed back, or the volunteer has to make a call to reply with their free timings. Replacing it with an easy SMS that the potential volunteers can reply to increases communication and coordination efficiency.

In addition, the use of online deals site like Godeals.com or Craigslist where the organization can post coupons and deals information online at these deal aggregator sites and link customers its own retail site or physical store front will help to increase publicity and thus public awareness of the organization.

Benefits and Justifications
With these improvements, the benefits that will be observed are:
1. Increase volunteer and members participation in events within one year of implementation
2. Increase in responses to events notification
3. Increase in customers visits to the DDB and Thriftique and the organization's online store within one year of implementation
4. Increase in revenue and donations

Implementation Strategies
The detail implementation steps for these strategies are presented in a timeline, together with the resources required at each stage.

Note: These software and online systems are only suggestions to the overall concept. At the 3rd year, there may be better software or online marketing medium available. The technology committee should keep a lookout for these new opportunities.

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Thus, the software and implementation plan below may be revised due to changes in technology or technical capabilities or resources in the future.

Date	Tasks	Resources	Cost
Jan 2011	Online deals aggregator website: • Search for other similar websites • Re-evaluate Godeals.com If implementing: • Register for an account at Godeals.com • Post Coupons or deals advertisement and share them with the public • Create link to the deal pages for online deals	Drue (Internal) GoDeals.com	2 more work hours weekly
Feb 2011	Frontline SMS • Search for other similar software • Re-evaluate Frontline SMS If implementing: • Request for software • Install software • Load mobile numbers • Send message and manage and respond to the return messages	Drue (Internal) FrontlineSMS installation documentation and user forum[9]	6 work hours (initial) 2 more work hours weekly Free software and documentation

Outcomes

Areas of impact	Outcome (Positive/Negative/Neutral)
Organization	Positive. o Greater market presence o More members, participations and donations
Programs	Positive. o Increase responsiveness to events and advocacy efforts o Improve program management
Technical Environment	Positive. o Increase in value and importance in the organization when benefits are explicit and visible o More sophisticated use of technology
Technology management	Neutral o More documentation and management efforts needed
Internal and External communications	Positive. o More pervasive communication and dissemination of information o Higher hit rate of campaigns (events, advocacy efforts)

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[9] FrontlineSMS help and user documentation

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