II. Recommendations

A. Vision

Ideally, SVDP can input all organization related data such as donations, financials as well as assistance information into a single repository by all employees and will only require information to be inserted into this data store once. Employees will be able to validate information they receive from external sources such as conference and district members with information from their own repository and will be able to generate reports with the information that is stored from this repository. Employees are able to handle more technical problems on their own rather than relying on the external technology consultant. The organization is also able to help more people than it has done in previous years.

B. Goal 1: Improve efficiency of client (people in need) communications

a. Introduction of goal

Currently, there are a lot of inefficiencies within the client call in process where the client has to tell multiple people the same level of detail. Also, there is a set list zip codes that the organization can serve; however, they are flooded with at least 10% of the calls being clients that they cannot serve. Therefore, the purpose of this goal will be to remove those inefficiencies to help serve more people by decreasing the time it takes to handle calls. [Exhibit D]. In addition, all calls can only be made and answered when the assistance coordinator is present, which is during working hours of the normal work week. In the last fiscal year, there were 6500 calls, which translates to 25 calls per work day if evenly spread throughout the year. In the past fiscal year, there were 7295 calls, which translates to 28 calls per work day.

b. Motivation

Clients who call into SVDP, call for items that are an immediate need for him/her and his/her family. Removing the inefficiencies will help get the things people need to the right people in faster time. Getting items to the clients faster will help relieve the need of the clients faster, which directly affects the mission statement and it will increase the reputation of the organization. Also, when the clients are desperate especially when it comes to utilities, clients will not need to call one number to find a different number. They will be able to get all they need from one given number as well as be able to call at any point in the day regardless of work hours. More clients will be served and will be served in less time.

As mentioned above, at least 10% of the calls are from clients that live in a zip code that the organization does not serve. When these calls come in, while the organization cannot help them, as they are in need, the clients explain their situations to the assistance coordinator. Although the organization cannot help the client, the assistance coordinator must listen to their request for and reasons needing help. If the calls were evenly spread out, this could mean 208 hours or 5.2 weeks per year that is spent on taking calls from clients that cannot be served by the organization.

Currently, there are more calls coming into the organization than there were last year especially with the failing economy. Now, the organization will be able to manage more calls than they had before. Also, the person who receives the call will no longer have to feel discouraged and stressed each time a client who is in desperate need explains to them why the organization must help them. Also, decreasing inefficiencies decreases the costs involved with these inefficiencies. With these additional savings, the organization can use the money to help the clients so that more clients can be served.

c. Strategies

To reach this goal, the student consultant recommends two strategies: implement a CRM, implement an interactive voice response (IVR) system, which is similar to an automated voice mail system that one would encounter when calling credit card service centers, and then to link this IVR to a CRM so that all calls may be logged. Also, the organization will be able to use this information in the CRM to decide if there is a need that can be filled by the organization. For example, if there are an overwhelming amount of calls in a certain area, the organization could look to see how those needs can be provided for by them.

First, the organization needs to move to the CRM platform. There are either open source (free) or commercial platforms. The student consultant recommends a commercial platform such as salesforce.com to ensure the known compatibility with the IVR as well as the high level of support they can provide. The log sheet should be transferred over to the CRM using the import functionality of the CRM. Then, the organization should design the IVR. The steps in which the client will be submitting their information. As seen from Exhibit A, the steps that have been observed are:

1. Retrieving need information
2. Retrieving zip code information
3. Deciding if needed services are available in the zip code given
4. Referring/routing the client to a local conference or different organization that can help them

Upon knowing the design of the system, the organization must find a suitable IVR host company. Since angel.com already prides itself on serving non-profits, angel.com seems like a great IVR host company. Many IVR's including angel.com provide linkage to CRM's; therefore, a host that can provide the organization that link to the CRM that they have should be selected. The IVR will then walk the organization through with how it can be set up and how it can be linked to the CRM.

d. Expected Outcomes

The assistance coordinator no longer needs to take initial calls from the clients. Using the CRM, she will be able to know exactly where the client is in the process and give an accurate approximate for when goods/vouchers will be delivered or can be picked up. The assistance coordinator now has more time to attend to her other duties such as the food pantry. The CP no longer needs to cover for the AC in her absence so the CP has more time to do her work. The clients are able to get items they need in half the time that it used to and no longer has to wait for a callback from the administrative office if they were not able to speak with the assistance coordinator the first time that they called. All clients that have called in within the past year has been served by the organization.

e. Additional Resources

Internal resources

Sharon has learned about CRM and how to use a type of CRM; therefore, she would be a great resource when learning the system. Her learning curve should be a lot smaller than those who are learning the system for the first time. Also, since Julia is the assistance coordinator, she should help design the system to ensure that all necessary information is captured by the system.

The organization can either choose to purchase systems or have the IVR hosted elsewhere, which is recommended based on cost as well as the technical support available at the host. If it is hosted elsewhere and it is linked to the CRM, to access any of the information, the organization would only need access to a computer with internet to access the portal for the IVR as well as the CRM.

External resources

Angel.com is an IVR vendor that markets to the non-profit sector. They already work with California Association of Food Banks and with Charlotte County's Alzheimer's Association. The organization should refer to their website: http://www.angel.com/solutions/app-np.jsp.

Plumvoice is another IVR that was recommended by someone on the non-profit tech blog. Their website is: http://www.plumvoice.com.

The non-profit tech blog that describes a success story of implementing an IVR can be found at: http://www.nonprofittechblog.org/the-magic-ivr. This is a great testimonial from an actual user that the organization can use to reference if they decide to move forward with Plumvoice.

Salesforce.com is a CRM that has released a non-profit version of their services. They offer a comprehensive CRM that will help the organization become more organized and efficient. In addition, the salesforce.com non-profit community has released a website solely based on leveraging CRM's for their non-profits and can be found at: http://nonprofitcrm.org/.

Budget

Unfortunately, most IVR websites only allow price quotes rather than having their price listed on their site. According to PC Magazine, one IVR (angel.com) that advertises to non-profits has a price of $39.95[i] per month if the IVR is hosted at the vendor. With a conservative estimate of $10 per hour spent on wages and benefits and with an average of 3.5 calls coming in per hour, one call would cost $2.86. Total annual cost of taking calls amounts to $20,842.86. With an IVR, only $479.40 would be spent across 12 months.

In terms of the CRM, salesforce.com have released a non-profit version of their services that is offered free of charge to non-profits. Therefore, there are no direct costs related to the use of the CRM. However, there will be costs in terms of work force. The assistance coordinator will now have to dedicate some time to learning and using the CRM. However, this is plausible in a short time frame given that the IC was able to learn how to use a CRM in less than two months having training only once a week for less than hours.

C. Goal 2: Improve efficiency of organizational processes

a. Introduction of Goal

Currently, there is much inefficiency within the organization. The information coordinator is getting information from other sources although most information can be retrieved from other employees of the administrative office. For example, for the annual reports, the IC receives financials from each conference for all those they served. However, much of this information can be generated from the financial coordinator who records such information. In order to make sure that these forms that the IC receives from the conferences are near accurate, the IC must validate each individual data element. However, if she had a benchmark number from the FC, she would be able to validate the data from the conferences and district councils much more quickly. Also, there is a lot of time spent on explaining forms to conferences which creates inefficiencies for the information coordinator, who does the explaining, as well as the conferences who could be using this time to help clients and fulfill the mission of the organization.

b. Motivation

The organization's mission is to help people. The greater the inefficiencies within the organization, the less able the organization will be to fulfill its mission. Inefficiencies take away time and money, which are both valuable in serving those in need. Removing these inefficiencies will leave the organization with more time spent helping people and more funds going toward clients in need meaning more clients will be served. This check will help keep conferences and district councils more accountable. The conferences and district councils should have numbers that are equal to or above the numbers generated from the administrative office since there are some costs and elements that are not recorded by the administrative office such as rent. Also, annual reports have been a source of frustration not only for the information coordinator but also for the conferences and districts that must also fill out this information. The greater the stress and frustration, the lower the morale will be. The lower morale will discourage the members of the organization from reaching the full potential and distract the members from the great work they are doing for their community. In addition, being able to validate data elements by another benchmark number allows the organization to bring a more quality and accurate annual report to the potential donors as well as the national organization. Most of the great service that the organization provides is understated but through this system of checking, the organization will be able to report higher and more accurate numbers that will bring faith of the organization to the current donors as well as spark interest in potential donors.

c. Strategies

To make this goal a realization, four actions are recommended:

1. Place all forms online
2. Use screencasts for learning to use online forms
3. Use webcasts for forms to increase understanding of forms
4. Annual report work sessions at a computer lab with audio equipment
5. Everyone use CRM for all donation, assistance, financial information

Sharon has already learned how to create online forms. These forms should be made available a month in advance to the working session so that those who want to fill out the forms without any assistance can do so. The second step would be to use screencasts to help those filling out the forms online to learn how to use the online forms. Screencasts are videos of the screen and can have an overlay of sound. Therefore, the IC can capture the images on her screen and point to things or show examples and then talk over it so that the person watching the screencast can understand what she is doing much like a presentation. The third step would be to create webcasts that would help the conference and district members on questions they would have regarding a specific form item. A webcast is a media file that is accessible via the internet through streaming technologies. This is similar to a television but the difference is that the user would be experiencing the video through the internet rather than the television set. The simplest way to implement this step would be to setup a camera on either a tripod or a flat surface and tape the directions or information needed. Then, upload this video file to the internet using a free service that would host such data such as dropbox. The webcasts should be implemented simultaneous to the first step or simply after the first step and before the third step so that those who fill out the forms can have some additional assistance if needed.

The fourth step would be to host an annual report work session at a computer lab. Having everyone present at the same time working on the same thing benefits both Sharon and the members themselves. Many times, members of different conferences and districts had the same questions and Sharon would need to answer the same question numerous times. The members can learn from each other and each other's questions thereby, decreasing the work load for Sharon. Also, having it at a computer lab will encourage more people to fill out the forms online, which would save Sharon the time from having to input the information from paper to digital. In addition, the members can use the webcasts as an additional resource for their questions using the computers.

The final step would be for each employee of the SVDP administrative office to use the CRM to input donation, assistance and financial information. This should be a phased implementation to decrease confusion among workers as well as to keep the information valid. Also, the organization must stress the benefits of this system and must receive 100% buy-in from all employees as well as the technology consultant to ensure that this process can be changed effectively. Although this may conflict with the organization's access database that is being created for the IC's contacts, the access database will only be capable of holding the contact information. Therefore, having a single repository will empower the employees with more information especially the IC. In addition, with the export functionality being implemented into the access database, the data from the IC's repository will be easily transferrable to the new CRM database. This CRM will enable Sharon to generate reports from the data given her by the other departments. By doing so, Sharon will have another reference to the accuracy of the forms given her by the conference and districts. The numbers generated from the CRM should be as much as or smaller than the number given by the conferences since conferences have additional spending like rent that the organization would not necessarily know about. Having this additional check will help keep the conferences more accountable as well as translate more accurate numbers to the national organization as well as to the donors. Since many times the financials are underreported, it may seem like the organization is helping less people than they actually are. Therefore, the accuracy will give confidence to the donors that the money they are spending on the organization is being put to very good use.

d. Outcomes

Some conferences and district councils use the online forms while others come to the annual report work sessions. The former uses the screencasts and webcasts to help their understanding of the online forms as well as the form elements itself. Sharon leads annual report sessions at a computer lab after having put the annual report forms online. Each district member then fills out these forms during the session. When the district member has a question, he/she first watches the webcast that addresses the specific question that he/she is stuck on. Since the lab will have headphone equipment, this will be possible for each and every attendee. If the webcast doesn't fully address the needs of the district member, Sharon comes over to answer the question. Sharon no longer has multiple one-on-one sessions with different members of the conference and the district and only holds at most two of these work sessions. Through these work sessions, the district members are also learning how to use the computer and are seeing the benefits that it could bring to their districts and conferences. Some have even purchased computers that will decrease the inefficiencies of their work thereby increasing the number of people served. Due to increased understanding of the forms, the district annual report forms are more accurate.

Additionally, every administrative office employee uses the CRM to input their data. Sharon then generates reports based on the information given to her from the CRM by her colleagues. She uses the financials of donations and assistance as a check to verify the accuracy of the district annual reports.

e. Additional Resources

Internal Resources

Again, since Sharon has used a CRM before, the organization should use Sharon as a resource. Also, since Sharon manages the annual report information as well as helps the conferences and districts with their annual reports, she should lead the organization's work sessions. Since the CRM is an online resource, the organization can continue using their own computers and networks to access and update the CRM. Also, since Sharon knows and understands how to use google forms, she would be a key resource in getting these forms online. Sharon also knows what webcasts are as well.

External Resources

CRM's are an online resource. Therefore, most documentation will be found online for CRM's. The websites from the previous goal also apply in this section. Additionally, the non-profit technology network would also be a great resource. This network teaches non-profits about potential technologies including CRM's and they have a conference from April 26-28 in San Francisco. Their website is: http://www.nten.org/.

Also, the organization should consult with universities in the Pittsburgh area such as University of Pittsburgh and Carnegie Mellon University to arrange a rental of one of their computer labs.

Getdropbox.com offers a free file sharing online storage system. This would be of great use to the organization when trying to find how to upload the webcasts for form help. Using this service, the IC would upload all of the webcasts with each video's name matching the question number and text. Then, the person who completes the form can easily find the appropriate webcast. The site is: www.getdropbox.com. While this can be accomplished by having it on the host site, the setup cost is lower with this option since no one would need to create and maintain a members only section on the site.

Jing Project is a free screencast service and gives options for how the user would like to store the media files. The site for this application is: www.jingproject.com.

Although Sharon will be leading the lab sessions, the organization should also hire a tech-saavy low-cost college student to help run the sessions to ensure that the technology end runs smoothly. With constantly changing technology environments, Sharon may not be able to handle all of the technical questions during these sessions. This can simply be done through the use of publications to the universities or getting in touch with a specific school's advisor.

Budget

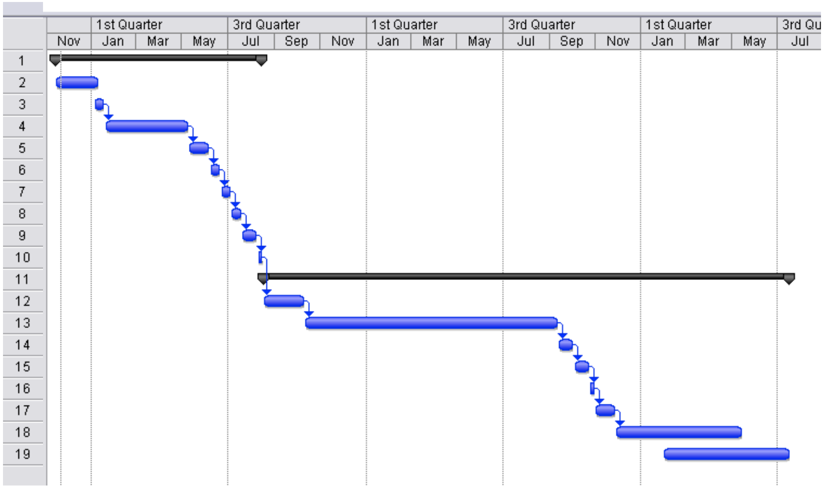
All resources are free if a free CRM is chosen. The student consultant recommends salesforce.com's non-profit CRM. Also, the information coordinator already has a digital camera that she can use to record videos for the webcast for help on the annual report forms. She can simply upload these videos using a free storage service such as dropbox or Jing.

The greatest cost in this implementation will mostly be time and work force. Sharon will simply be continuing her duties by using the time that was formerly spent on one-on-one sessions to run the lab sessions. However, in order to learn the CRM, the employees must spend a portion of their work time towards learning and transitioning to the new system. Sharon was able to learn this system in less than two months. Twelve months have been allotted for training and transitioning since this will be a phased implementation.

A monetary cost that the organization must incur is the cost of hiring a student. However, a tech-saavy student can be hired for anywhere between $10 - $20 per hour depending on experience. An individual with enough technical experience would cost around $15 per hour which translates to around $90 total for six hours of service, which means around two lab sessions given that each lab session will approximately last from two to two and a half hours.

The aforementioned recommendations can be realized by the mid 2011. See figures below.

	Task Name	Duration	Start	Finish
1	**− Increase efficiency of client communications**	**196 days**	**Fri 11/14/08**	**Fri 8/14/09**
2	Get buy in from employees and technology consultant	2 mons	Fri 11/14/08	Thu 1/8/09
3	Choose CRM	2 wks	Mon 1/5/09	Fri 1/16/09
4	Learn CRM	4 mons	Mon 1/19/09	Fri 5/8/09
5	Transfer to CRM	1 mon	Mon 5/11/09	Fri 6/5/09
6	Choose IVR	2 wks	Mon 6/8/09	Fri 6/19/09
7	Design IVR	2 wks	Mon 6/22/09	Fri 7/3/09
8	Setup IVR and integrate with CRM	2 wks	Mon 7/6/09	Fri 7/17/09
9	Test IVR	3 wks	Mon 7/20/09	Fri 8/7/09
10	Implement IVR fully	1 wk	Mon 8/10/09	Fri 8/14/09
11	**− Increase efficiency of organizational processes**	**500 days**	**Mon 8/17/09**	**Fri 7/15/11**
12	Get buy in from employees and technology consultant	2 mons	Mon 8/17/09	Fri 10/9/09
13	Training of computers and all technologies	12 mons	Mon 10/12/09	Fri 9/10/10
14	Place forms online	3 wks	Mon 9/13/10	Fri 10/1/10
15	Record videos for webcast	3 wks	Mon 10/4/10	Fri 10/22/10
16	Transfer videos to host service	1 wk	Mon 10/25/10	Fri 10/29/10
17	Hold work sessions	1 mon	Mon 11/1/10	Fri 11/26/10
18	Get trained with CRM	6 mons	Mon 11/29/10	Fri 5/13/11
19	Transfer to CRM	6 mons	Mon 1/31/11	Fri 7/15/11



i http://www.pcmag.com/article2/0,2817,1649655,00.asp