Peoples Oakland

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I. About the Organization

Organization

Peoples Oakland is a nonprofit organization established in 1971 dedicated to improving the lives of those in the community with severe mental disorders; including schizophrenia, bipolar depression, and substance abuse. Their address is:

3433 Bates Street in

Pittsburgh, PA 15213

Their members come from several areas in the county Allegheny, and are usually referred to the organization by local clinics and physicians who download the referral form for the client from the web-site "http://www.peoplesoakland.org."

Their mission statement:

> *To develop an Oakland-based organization that facilitates consumer and community participation in identifying and responding to the changing social, economic, vocational, intellectual, political, physical and spiritual needs of mental health consumers.*

Gary Lefebvre was the executive director up until October, when he left the organization. This presented a problem because Gary was the only one who knew how to maintain the web-site and the only one who understood most of the technology in the organization (such as network security, database storage, and other technology-related information); upon his departure, no on-site staff member was as well familiar with technology (computer-related) as Gary.

Facilities

Peoples Oakland is leasing their building. The executive director and the three supervisors have access to the server room. The building has a computer cluster with six desktops on the first floor, they are dell computers with Microsoft Windows XP installed. This area and computers is for the use of the agency's consumers.   There is also an exercise room on the first floor accessible to consumers. The recreational lounge is on the second floor, with a pool table, ping pong table, board games, and several couches with a balcony to provide a relaxing atmosphere. The executive director's office is located on the third floor, where there is also the conference room. On the fourth floor, there is an arts and crafts room, a gardening room, and some office rooms. All four floors are accessible to registered clients.

Ann Harris is located on the 4th floor, and Lisa Nevel is located on the second floor.

Programs

Social and recreational programs include the following: a drop-in lounge for relaxation and various recreational activities, day-trip outings to local areas, vacation trips, competitive sports programs, arts and crafts, parties and special events.

There are also recovery and wellness services including the following: support groups for mental illness and substance abuse, nutritional counseling, healthy cooking, classes on job skills, weight loss support groups, smoking cessation programs, and stress management training.

The employment programs help members improve their job skills for future employment.

Events are posted on the web-calendars which is posted monthly on the website, a printed calendar is also posted in the building, flyers for various events are posted on some walls of the building and inside the elevator.

Staff

There are 13 staff members, with part time interns and employees that equate to 2 more full time staff members. Gary Lefebvre was the previous executive director. There are three supervisors/managers, including Rebekah Lott (also director of Recovery & Wellness Program), Ann Harris and Lisa Nevel. The consultant will be working primarily with Lisa. Most staff members have worked at Peoples Oakland for over 10 years.

Technical Environment

Every staff member has a networked dell computer, running on Microsoft Windows XP with access to networked printing and file storage services. The organization has DSL throughout the building. The machines are three years old, the six computers in the computer cluster are less than a year old and also run on Microsoft Windows XP. The previous website was updated by Gary on a monthly basis, each week, new calendars need to be posted; these calendars are created by Ann Harris, and posted on the web-site by Gary using HTML.

Lisa has a printer in her office, and there is a laser jet printer on the 3rd floor that staff members can use. Every staff member has his/her own telephone, and there is an intercom in the building that can be heard in all areas of the building.

Technical Management

The management and client information databases is leased from a Pittsburgh-based company called Unicentric, which offers a web-based application for this purpose. Unicentric also

provides staff members with e-mail accounts, and is their primary source of internal communication. All on site technical problems were managed by Gary, who was provided with training by a Tech Consultant from Carnegie Mellon years ago. Gary trains staff members with specific functionalities of the Unicentric system, such as e-mailing, conference scheduling for meetings, and etc. The staff members in turn can teach one another and share knowledge. The organization's database is backed up each month by Gary; however, since he left in October, this has not been done. The server room is accessible only by Lisa and Gary, where the database is stored and backed up on hard-drive disks. The network router is also in the server room.

Technology Planning

The agency has nearly completed its current technology plan centered around HIPAA security compliance and upgrades to printing, software, OS, network file servers and server OS and firewall hardware and software. The next plan will focus on upgrading desktop workstations and internet connectivity when grants and funds from the community provides the opportunity to do so. Security is important because the company needs to keep member information confidential due to HIPAA policies.

Internal and External Communication

Peoples Oakland is a drop-in center making most communication face to face. There are event calendars online that website visitors have access to. Outside sources, such as clinics, can access the website and download the referral form to refer a patient. There is a message board accessible only by staff workers where they discuss information on the members, this message board was managed by Gary and kept private from non-staff members. Unicentric provides each member with an e-mail account accessible from the Unicentric webserver, they use it extensively as a source of internal communication. The e-mail address of staff members are posted in the contact us section on the website, so that they can be contacted by clients and anyone else.

Information Management

Some limited data for staff members and many events are managed in Microsoft Excel and Access which is used to keep track of attendance. By 2012, all members should have electronic information stored and managed by Unicentric, this is to comply with the Health Insurance Portability and Accountability Act (HIPAA) Security Rule, which is a federal legislation that was passed into law in August 1996. The overall purpose of HIPAA is to enable better access to health insurance, reduce fraud and abuse, and lower the overall cost of health care in the United States, and transferring all member data to electronic-based form will be an important step towards meeting that goal.

Business Systems

Business systems include Microsoft Office 2003 Professional. Each staff member has limited needs for the software with Microsoft Word and Excel being used most often. Accounting systems are maintained on Peachtree Complete Accounting software.

II. Create new website

Only one person in Peoples Oakland knows how to update the website, and that person (Gary) is seeking to transfer these skills and responsibilities to another member of the staff to allow

time for other projects. The current website was made by Gary using HTML, a web-development software such as Frontpage would be easier for some of the staff workers to learn, and that is a primary goal, to transfer web development skills to the staff. The current website also has a lot of outdated information, so a new website will build on contents that should be kept with additional information. The website has been up since 2003, and has contact and organization information that potential clients can gain access to, the referral form required for membership is also downloadable from the web-site. The website acts as a significant method of communicating the organization's focus and services to the local community. Since Lisa was the one who volunteered for the process consultation program, she was the one who mainly worked on the project.

Expected Outcomes

Teach Lisa how to make a website using Frontpage. She will be making all the pages, and the consultant will watch over her and discuss with her what she's doing as she's doing it, so as to make sure she fully grasps the concepts and tasks.

The outcome will be measured by how much she learns throughout the weeks and how independent she becomes in making and maintaining the website on her own. Lisa will be quizzed each following week, these will be done by the consultant asking her questions as a source of review of what was covered in the previous week and what she should've looked over during the week. The consultant will eventually start giving her tasks, which will be concepts she must learn before each meeting; she will have to do certain tasks in Frontpage, such as editing a hyperlink property and inserting/editing an image, these will be done with minimal support from the consultant (the consultant will not offer a solution until she's either made a mistake or is approaching the task the wrong way).

Additional Impacts

Lisa is expected to become more technology savvy as she will be using the computer for much of the project; not only will she become proficient in web-development using Frontpage, but she will also become comfortable with the technology that is available to her. She can utilize her expertise to help and teach other staff members in the organization; she will explorer new experiences in using the computer and internet, as she will have to learn tasks aside from operating Frontpage, such as installing an USB device and connecting a digital camera to the computer, converting files, and downloading from the internet.

Because Lisa will be taking notes during every session (she will print out the Frontpage tutorial and mark related notes on them), it will prove to be valuable for other staff members to view these notes and gain some understanding on how the new website will be maintained. Because the employee turnover rate is low, and Lisa, like many other staff members, has worked at Peoples Oakland for over 10 years, it's relatively safe to assume that she'll be with the organization for a long time after the completion of the project, and she will have plenty of time to transfer her skills to any other staff member who wishes to attain them.

Feasibility

There is time to complete this project. Lisa was the staff member who volunteered for TCinC, and she has shown great enthusiasm and determination to learn. This is within the consultant's skill set, as Frontpage is relatively easy to learn. The sustainability of this project is good because Lisa will acquire a skill that she can teach to other staff members, and if Lisa

were to leave, the documents taken during the project will be left behind for other staff members, and they can learn to manage the website. The organization right now has a website that only the assistant executive director knows how to maintain, and that is mainly because the website is done in HTML, and HTML is outside the scope of skills for most staff members. As mentioned above, the website is a strong communicator to the local community, many clients live far away from the office building of Peoples Oakland where they hold most events and programs, so finding out information about the when's, where's, and what's is made easier by visiting the website.

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Outcomes

The community partner created a new web-site for Peoples Oakland, which uses a lot of the files that were used on the previous web-site, such as some image files, PDFs, and others. The community partner had no prior experience with web development, but her knowledge in and familiarity with Microsoft Office tools (for example, Word and Excel) made understanding some of Frontpage's functionalities easier; for instance, the methods for inserting an image and text editing are very similar in Frontpage and Microsoft Word. The community partner knows how to select all of a web-page, and how to copy and paste it to a new html file in the Frontpage editor, this is how she transferred much of the old web-site to the new one in Frontpage. She also learned how to add images, texts, and other contents to a web-site, this is useful because the old website hasn't been updated for close to half a year. She would spend at least an hour everyday doing tasks like folder management -that is, moving files from one folder to another and searching for files in various folders-, importing new files into the work folder for the new web-site in Frontpage (which is important because you can only use files that are already imported into your web-site's work folder), and inserting those files to appropriate sections of the web-site. The community partner also learned how to re-size an image, create a hyper-link (by editing hyper-link properties), and linking web-pages together. The old web-site had a little over forty pages, and the process of transferring all those pages to a new web-site in the Frontpage editor was a very repetitive process (took six weeks to complete), and the community partner received a lot of practice over the six week span (six three hour sessions) it took to create the new web-site.

For the first two weeks, the community partner needed much assistance and guidance while using the Frontpage software, but by the third week, she was able to work independently and created twelve web pages on her own. The community partner keeps a journal of everything that she did on a note-pad as well as in a Microsoft Word document file, which serves as a reference for her and may aid other staff members who may want to learn how to update the web-site using Frontpage; although no other staff member has expressed any interest to learn, there may be a future employee who joins the staff and show desire to learn web-development.

Before the consultant's arrival, the executive director, Gary, was the only one who knew how to update the web-site; he did it using HTML. But eventually, the executive director ran into the trouble of not being able to upload the new monthly calendar pdf files (created by Ann) onto the web-site. Originally, he could just replace the pdf file with the new pdf file in the appropriate html tag, but it stopped working that way for some unknown reason, Gary was unable to track down the problem and the consultant never investigated it. And thus, the calendar wasn't updated for a couple of months. This along with the fact that the executive director was planning on leaving Peoples Oakland is the reason why it was decided to transfer web development skills to another staff member, and because Lisa, who volunteered to learn how to make a web-site, is not as technology savvy as Gary, learning Frontpage seemed like the better option than learning HTML because it's much easier to learn with its easy to understand user interface. Linking PDF files from web pages is easily done in Frontpage, the community partner imported all PDF files, including the calendar and events schedule, into her Frontpage work folder, and then she links a web-page to a PDF file by editing the hyper-link property of a web content (such as a body of text or image).

In order for this task to be sustainable for an extended period of time (six to eighteen months), the community partner needs to regularly update the web-site so as to keep the skills of

using Frontpage fresh on her mind, updates need to be done at least once a month, as calendars and event schedules are made monthly, and the news section of the web-site may also need to be updated accordingly (whenever the news on the website becomes outdated or when there is new news of importance and relevance to the organization. The decision of what is and what isn't allowable on the web-site is decided by Sandy, the current executive director (who arrived shortly after Gary's departure in October), she has the right to demand the removal of any web-content. It would be ideal for the community partner to transfer her skills to other staff members, so certain tasks can be split between workers and thus providing more flexibility.

Recommendations

Recommendation #1: Gary Lefebvre, the previous executive director of Peoples Oakland had been with the organization for over a decade; he had seen the organization through several technological changes, from the new Dell computers the organization received three years ago, to the introduction of Unicentric's web services. Besides Gary, no staff member is familiar with the technology available to the organization. The process of updating to the web-site using HTML was known and understood only by Gary, the website contains a very elaborate overview of the organization, including referral forms, contact information, links, and program information. It is important for the staff members to know how the organization is presented on the web-site, any irrelevant or inaccurate information needs to be reported to the one person in the organization who knows how to update it (that person currently being Lisa Nevel). Upon Gary's departure, the only technological expertise the organization can turn to are off-site consultants whom they pay by the hour for their services. This is inconvenient for several reasons; one, the help provided is not immediate upon request because the consultants are off-site and may be unavailable sometimes; second, the staff members will have little opportunity to gain any knowledge and experience from the work that is done, because once the problem is fixed, the consultant's job is done, that job being fixing the problem, and not really taking care into explaining what the problem was and how it can be avoided in the future; this approach is one of 'Purchase of service or expertise,' where the process is closed and made completely oblivious to the client. A suggestion would be to hire an on-site technology consultant, who's job is to make the process of technological support within the organization one of 'Process consultation,' one whose job is to teach as he/she performs the task (of running a program, or fixing a computer).

There is a lot of machinery in Peoples Oakland, around thirty desktops, twenty printers and copiers, and a server room where the router, network equipment, and organization database is stored. These were all set up during the Gary's tenure within the organization. Since his departure, there has been no one (including the new executive director, Sandy Phillips) within the organization who is technology savvy enough to understand how all of the softwares and hardwares work. Hiring someone to manage and maintain the electronic equipment will solve this problem. Unicentric is a web-based company that provides Peoples Oakland with e-mail accounts, database storage, and internet security. The previous executive director knew how to use Unicentric to its full advantage, he was able to perform such tasks as updating a member's information, setting up a conference meeting, sending e-mails, and etc. He taught certain tasks to certain employees, but not all of the tasks to any staff member, having employees with varying skills (a staff member who knows Excel but not Word, and another staff member who

knows Word, but not Excel) is beneficial to the organization in that it provides an environment where staff members can mutually share knowledge in various skills; however, in the case of Peoples Oakland, the overall set of the staff members skills does not contain any knowledge of web-development, this is a problem because the web-site has been up and visited (over a thousand visitors each year) since 2003, and for it to suddenly disappear due to a lack of maintenance and understanding of how to access and manage the web-site may harm the organization's reputation, for instance, some clients may think Peoples Oakland has disappeared, and some clients, especially those who live far from Peoples Oakland's main building may have trouble finding contact and location information, and thus, cannot attend or participate in People Oakland's activities and programs. Having an on-line consultant who is thoroughly familiar with web-development can provide the organization with a more expert looking web-site, and thus appeal to its clients and visitors. Having an on-site consultant would also help with technology problems that they are almost certain to run into, he/she would be able to learn all of the technology within the organization and teach them to staff members , he/she will also be able to offer immediate help and service when needed. This will help the organization in the long the run because it will keep organizational operations moving along smoothly without disruptions due to technological mishaps.

However, if cost makes hiring a technology consultant unfeasible, Peoples Oakland can turn to a technology plan that enables learning and sharing of information. Lisa Nevel is only familiar with Frontpage, but is still somewhat unfamiliar with the other aspects of web-development, such as reading and understanding HTML code, configuring advanced options with Frontpage (such as opening a HTML flag tag), although this may suffice, full maintenance of a web-site requires understanding that extends the basic functionalities of a web-development tool such as Frontpage. But if a technology plan includes weekly meetings, and staff training sessions led by staff members (Lisa could teach an hour session of using Frontpage to other staff members), the overall technological expertise of the organization will rise, and they will become more independent in operating an organization which significantly relies on the use of technology.

Recommendation #2: The supervisor of Social Rehabilitation Services, Lisa Nevel, volunteered for the TCinC (Technological Consulting in the Community) to learn how to update and maintain the web-site using Frontpage. There is a policy that prohibits staff members from downloading off the internet, this restriction can be overridden with the administrator's login/password. The only person who has access to this login/password is Ann Harris, who is the Quality Assurance & Documentation Manager in Peoples Oakland, but she may not give out this login/password to anyone unless the executive director gives her permission to do so.

Recommendation #2: Frontpage is an easy software to learn, however, it alone cannot suffice as all the tools needed to efficiently maintain and update the website. For instance, a PDF to DOC converter would be needed in order to convert a PDF file into a DOC file; a FTP program with an user interface would be much easier to use than doing it in the terminal; and softwares such as Photoshop, web-counter, and others would be very helpful for the job of web-site maintenance. If the Lisa is given the administrator login/password, she won't have to go to Ann Harris every time she needs to download something, which can be tedious and inconvenient because Ann works on another floor in the building. This will

give Lisa more flexibility in doing various tasks on the web-site, and thus, attracting more frequent visits from the people exploring the internet (who may be looking for a local social and recreational program, or doing research on non-profit organizations), and getting information out about Peoples Oakland. I recommend officially giving web-development and maintenance duties to Lisa, and giving her rights to have and use the administrator password as it can greatly improve Lisa's web-developing capabilities (she will have access to download programs non-existent on her computer from the internet).

About the consultant: Chunlin Hu was born in Shanghai, China and has lived in the United States for 15 years. During his tenure with Peoples Oakland, he was a last semester senior with a major in computer science and a minor in business administration. His career expectations fall mainly in the Information Technology field, and a possible venture in the more business-like aspects of IT.