Technology Consulting in the Community

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Final Consulting Report

Society of St. Vincent de Paul

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Society of St. Vincent de Paul
Executive Summary

Student Consultant, Hannah Lee
Community Partner, Sharon Thorp

I. Background Information

Society of St. Vincent de Paul is a non-profit organization that seeks to help those in need in the Pittsburgh community with monetary or in-kind assistance. Their mission statement is:

> *Inspired by Gospel values, the Society of St. Vincent de Paul, a Catholic lay organization, leads women and men to join together to grow spiritually by offering person-to-person service to the needy and suffering. Vincentians witness God's love by embracing all works of charity and justice and collaborate with other people of good will in relieving need and addressing its causes making no distinction in those served.*

Although the administrative office is in a local suburb of Pittsburgh, the organization is additionally comprised of 9 district councils, 114 conferences, 1200 Vincentians and four stores located all across the city of Pittsburgh as well as one store in Butler. The community partner is an employee of the administrative office along with five other employees.

Currently, most technical management is being handled by the externally contracted technology consultant. Few technical details such as minor fixes for common software are managed by those within the organization. However, the server and the actual machines are managed by the technology consultant.

The community partner is the information coordinator and manages the front end of the website. However, she does not have any access to any elements on the back end, which at times can get frustrating. Also, she manages the contact data for mailing list recipients, Vincentians, conference, district councils as well as conference and district council officers. In addition, she compiles all the information from the conferences and district councils to generate an annual report to send to the national organization. To accomplish these tasks, she stores this data in a series of spreadsheets, which she often finds frustrating to manage.

II. Consulting Tasks

In this consulting engagement, the student consultant and the community partner took on three major tasks: decrease reliance on technical support, use website to market to and inform potential donors and increase organization of the organization's data.

In the first task, the student consultant worked with the community partner to transfer the current website to a virtual web host company. The student consultant provided research on potential hosts. The objective of this task was to have the host managed by dedicated firm and have this account managed by the community partner.

In the second task, the student consultant worked with the community partner in finding an easy and non-technical way to transform the website into a true marketing tool that will market the organization and inform potential donors about the organization. In this task, a content management system (CMS) was chosen that will allow sustainability of such an implementation. After the CMS was chosen, the student consultant worked with the community partner to ensure that the community partner will be able to use the system for all of its intended purposes even after the student consultant leaves.

In the third task, the student consultant worked with the community partner in finding an easy and non-technical way to increase the organization of Society of St. Vincent de Paul's data. In this task, a customer relationship management (CRM) tool was chosen on the basis of ease of use and understanding. Once the CRM was chosen, the student consultant worked with the community partner to ensure that the community partner will be able to use the system for all of its intended purposes even after the student consultant leaves.

III. Outcomes Analysis and Recommendations

While working and learning about each new technology (web host, CMS, CRM), the organization was able to increase its capacity through learning. As a result of the learning involved in trying to implement these tasks, the community partner has in essence become a better consumer of the technology services provided by the technology consultant. The community partner is now extremely knowledgeable about Joomla!, a CMS, and CiviCRM, a CRM for non-profits. Since she knows that technology that serves her needs exists, she knows that she will no longer have to devise ways to attempt solving her problems from scratch. She understands that many of her current problems can be solved existing technology and knows to look for and ask for such technologies. In addition, while learning about the CRM, the community partner learned about tables and relationships that will be vital when going forth with a different database solution. The organization has decided to leave the tasks to the externally contracted technology consultant. Regardless, through this consulting engagement, the community partner has accomplished the aforementioned outcomes.

The student consultant has also made additional recommendations that can be realizable within the next three years. The first recommendation is to improve the efficiency of client communications. The second recommendation is to improve the efficiency of organizational processes. Both recommendations are low-cost as well as easy implementations of processes and free or affordable current technologies.

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Alice is a 2nd year master's student in information systems management. She will begin working at Booz Allen Hamilton as a senior consultant next summer.

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Community Partner, Sharon Thorp

I. About the Organization

Organization

Inspired by Gospel values, the Society of St. Vincent de Paul, a Catholic lay organization, leads women and men to join together to grow spiritually by offering person-to-person service to the needy and suffering. Vincentians witness God's love by embracing all works of charity and justice and collaborate with other people of good will in relieving need and addressing its causes making no distinction in those served.

As the mission statement says, the purpose of this organization to help others who are in need. One of their policies is "no questions asked". The organization understands that it takes a lot just to come to the point to ask for help and they don't need to further humble themselves and state the reasons for which have brought them to this point.

Sharon Thorp, the community partner ,works in the administrative offices of the Society of St. Vincent de Paul (SVDP). The administrative office oversees all of the programs and compiles results of all the good works that all members of the Pittsburgh council have done. The administrative office has a total of six employees managing 115 employees across Pittsburgh. The employees are the people who work in the five thrift stores of SVDP across Pittsburgh. Those in need (clients) can shop in these stores either using cash or vouchers that have been issued by SVDP.

SVDP operates mainly through a base of volunteers. Conferences are a group of people who have elected to get together in a specific region to help those in their region. Conferences are often part of a church. A district is a group of conferences in a specific region of Pittsburgh. Vincentians are individual members that support the society through donation of funds or services. SVDP has also formed partnerships of various agencies including Red Cross and Salvation Army that often uses SVDP's services. There are currently 1200 volunteers, 114 conferences and 9 districts within SVDP Pittsburgh Council.

Facilities

The Society of St. Vincent de Paul Pittsburgh Council administrative office is in the basement of a building located in a suburb of Pittsburgh. Once you enter the building and go downstairs, the administrative office is to the left, kitchen, restroom to the left, a small cafeteria beyond there and the food pantry in the back (Exhibit A). The upper levels are rented out to local community members, parishes and organizations that might need the space for their events.

Most of the work is done in the administrative offices while the assistance coordinator also handles the work in the food pantry. Currently, the assistance coordinator (AC) has a computer at her desk in the administrative office as well as one in the pantry. In addition, the organization is going through a redesign to reduce the isolation caused by to the high cubicle walls and to condense the AC's two workstations into one.

Programs

Michael's Place

Michael's Place is a transitional housing program whose site is owned by the Society; run for ex-offenders with substance abuse issues with the goal of assisting them to make a successful transition into life outside of the prison. This home provides a transitional stage of an expected stay up to six months. Within the six months, the society stresses the ideals of SVDP which is compassionate healing. Upon preparedness to leave the facilities, one will have a full time job as well as a bank account to sustain life on their own. Michael's Place also ensures that the person has a strong support system and has arranged for a healthy place to live. Michael's is open to the homeless who are willing to fight against their addictions.

Food Pantry

SVDP also runs a few food pantries, one that is actually located at the administrative office building. They have two major food panties as well as a few smaller ones that are operated by conferences around Pittsburgh. Food pantries are basically a food storage location that clients can come and purchase food at cheaper prices or with food vouchers. Vouchers are similar to coupons or checks of some value that is issued by the organization. These vouchers can then be used to purchase food from the pantries.

Indigent Burial

The indigent burial program is for the homeless who often die alone without families. By partnering with local funeral homes and other agencies, SVDP is able to provide these men and women a proper and dignified burial.

Clothing Voucher

The clothing vouchers work just like the food vouchers. However, instead of going to food pantries to shop for food, people would go to one of the five stores to shop for clothing. Once the organization approves the vouchers, SVDP sends the voucher to the store and clients go to the store, picks up the voucher and uses them at the store.

Utility Program

There are many in the community who occasionally do not have funds to pay for utilities such as electricity, gas, or water. Therefore, SVDP provides temporary assistance usually in the form of one-time payments to utility companies.

Staff

All staff members have a desktop and use Microsoft Office products as well as access to the internet though the internet explorer browser. All staff members also have access and use the email address assigned to them by the organization.

Fred Just, Executive Director [ED]

He oversees the entire organization throughout Pittsburgh. He also handles the marketing for the organization to make sure there are enough funds and more people can be helped in whatever means. Also, he prepares and submits grant proposals. He finalizes and signs all the checks that leave the office including bills. In addition, he helps other conferences as well as network with other agencies.

Darlene Collier, Executive Assistant [EA]

She manages the office and ensures that the office runs smoothly. She also serves as the executive director's assistant; however, she also assists everyone else within the office.

Sharon Thorp, Information Coordinator [IC], Community Partner [CP]

She coordinates the information of and between all the volunteers, Vincentians, conferences and districts in the Pittsburgh region. She manages the mailing lists of all Vincentians, conferences, conference offices, district councils, district council officers, newsletter recipients through the use of Microsoft Excel spreadsheets for all of the aforementioned. She also compiles the annual report that is sent to the national office using excel spreadsheets.

Additionally, she assists the Executive Assistant, Donation and Assistance Coordinators with their work in their absence using Access and Excel to update donations and phone logs respectively. She also is the point of contact for all publications by the organization. She creates the publications through the use of Adobe InDesign.

Peter Yohe, Financial Coordinator [FC]

He handles all the finances of the organization. The finances include those of the stores as well as the billing statements that get sent to the conferences from goods that have been shipped or given from SVDP to the conference for the person in need. Peter uses Quickbook Pro for all financial needs of the organization.

Julia Wheeler, Assistance Coordinator [AC]

She manages the outflow of all the support (service/monetary). She keeps a log of all the calls in an excel spreadsheet that have come in for assistance and will also note all the assistance that has been provided by the organization. Julia administers the Dollar Energy and Christmas Gift Programs and manages the Manchester Food Pantry. Any help that was provided from the organization will be noted in the donations database. Vouchers for the food pantry and clothing stores will be printed from this database once Julia approves of them.

Gwen Payne, Donations Coordinator [DC]

She handles and manages all the donations that come through the society and directs the funds to the proper location. Gwen uses the donations Access database to update donations.

Technical Environment

All employees have a Windows XP computer with a broadband internet access. Sharon's computer specifically has the following details:

- XP Pro Version 2002
- Includes Service Pack 3
- Pentium(R) 4 CPU 2.00 GHz
- 768 MB of Ram
- 37.2 GB Hard Drive Storage

They also have phones and access to the copy machine and shredder. There is a server that connects all the computers.

Software for CP:

- Adobe Contribute for website

- Adobe InDesign for publications
- Internet Explorer for web browsing
- Microsoft Excel for annual report information as well as mailing lists
- Microsoft Outlook for email
- Microsoft Word for text documents
- Google Analytics for website

Adobe products are exclusive to the CP while the rest are used by the other members for their work.

Their website is currently being switched from being hosted by One Communications to Verizon. There was mention that there may be another switch to the externally contracted technology consultant's servers. The website can be found at www.svdppitt.org.

Technical Management

When they run into a problem, people will ask the EA. If the EA can't fix the problem, they will call Lloyd Troy, the technology consultant, who handles all of their technology needs. After the call, the employees wait for Lloyd to come and fix the problem, which may often take a week or two. Lloyd is a paid professional consultant with his own business; therefore, when he is unable to respond immediately, the CP gets frustrated.

Lloyd is currently managing the switch of their web host from One Communications to Verizon as well as looking to host the website on his own servers. However, during this switch, the password for the administrative access to the site was also changed and the CP was uninformed of this change. The CP is frustrated on having to rely on someone else, which often creates bottlenecks, and desires to do more on her own; however, due to her lack of knowledge of the technology, the current structure does not allow her to become self-reliant.

The CP currently manages the website, which is static, using Adobe Contribute to update content. The CP also uses Google Analytics to see how many people have visited the site. However, no further information is processed.

Technology Planning

Technology is purchased on an as-needed basis. While there is no technology plan, the ED is not reluctant to authorize such purchases if his other administrative employees find that they need a piece of technology.

Internal and External Communication

Most communication seems to be done by face-to-face contact or over the phone when dealing with internal communication. Most of the administrative office workers also have access to email; however, the main communication is still in person. The IC tries to tie technology into her daily routine as much as possible because she feels that it makes her life easier. Most external communications happen over the phone whether interfacing with other conferences, Vincentians, agencies (ie Red Cross) or clients. A few conferences and very few districts communicate to the administrative office with email.

The stores communicate with the administrative office by phone, email and fax. Handwritten daily sales reports are sent to the administrative office by the fax machine, which often causes the FC to be frustrated from inaccurate and illegible reports. All stores have a set range of delivery zones that are broken down by zip code. If stores have additional zip codes that they can deliver to, they will send this information via email to the CP. Otherwise, all other communication is done by phone.

The website is currently used as a marketing tool to increase awareness and donations. The site informs the members as well as non-members about the organization and ways people can get involved. The CP also handles a newsletter that is sent out to all those who have signed up for it. She simply drafts it using Adobe InDesign, exports it as a .pdf file and then posts it as a file on the website.

The website's main owner is Joe Polk, a Vincentian at PennState. He has freely volunteered to create the site. Sharon is only responsible to change the textual content on the site. She is actually not given the access rights to change any HTML (hypertext markup language) code or the template. Therefore, when she needs to do something that requires code, she must send an email to Joe Polk who will then make updates to the site when he is available. Sometimes, this does not get done and at times will take up to two weeks. Also, the externally contracted technology consultant deals with the web host matters. Sharon has no access to the web host. When problems arise, she must speak with or get in touch with the technology consultant.

Information Management

Shared files are stored in the shared folders of their computers so others have access to it. Backup should be handled by the tech consultant but the tech consultant is often unavailable. The organization stores some information such as the annual reports both in paper and electronic forms.

The annual report is a compilation of all the finances and good deeds the organization has done throughout the year. Sharon first sends out the annual report forms [Exhibit C - E] to the conferences and district councils. However, due to the poor design and description as well as the age of those filling out the forms, the forms usually are returned incomplete or incorrectly. In some cases, Sharon must spend one on one time with the person filling out the form so that the form can be completed correctly. After the IC receives all of the completed forms, she must compile the information of all the conferences and district councils.

The CP mainly uses spreadsheets to manage her annual report and mailing lists data. The CP manages the mailing lists of conferences, conference officers, district councils, district council officers, newsletter recipients as well as the financial and deeds done for annual report of each conference and district. The CP manages all of this information in a series of spreadsheets [Exhibit B]. For example, while one list contains a list of all the districts, another has a list of all the presidents of those districts and yet another has all the list of the conferences within those districts.

II. Scope of Work

Task 1. Decrease reliance on technical support

Sharon is responsible for maintaining the site's content, the front-end. However, she is not the person maintaining the site itself as well as the code for the site. In addition, although Sharon and Joe Polk, the creator of the site, are the only ones working with the website as well as the web host, Lloyd Troy, the external tech consultant, is the only one who has access to the web host. Recently, as the host was being transferred to Verio, username and password details were changed leaving Sharon surprised and locked out of the site. For two weeks, Sharon was unable to make changes to the site and Joe Polk was also unable to receive access to change the backend. During this time, Sharon simply waited for Lloyd to fix the problem. Also, since the actual web host is only accessible by the technology consultant, Lloyd has the ability to make changes without consulting anyone in the organization including the CP.

The website is used as a marketing tool to increase awareness and funding. While locked out of the site, Sharon and Joe were unable to make changes to the site. Since the technology consultant is not always available for the organization as he does have other clients, when problems like this arise, the organization will not have the ability to do what it needs to do like updating and maintaining the front and back end. If the website is not maintained and updated, then the website does not fulfill its purpose to increase awareness and funding. With increased awareness and funding, the organization can do more good works and fulfill its mission.

The task will be to transition the CP to becoming the owner of the site by using a webhost that makes her the super-administrator rather than have the host be a service from the tech consultant. Having the site hosted by a dedicated firm will be less costly because the organization will no longer have to pay an extra service fee for the consultant. In addition, virtual hosts are down to a very reasonable cost. Also, the website will have increased security and monitoring measures that a managed host can provide since that is the focus of their business. Managed hosts will be thoroughly researched and the host will be chosen based on cost, reliability, security and recommendations of others.

Expected outcomes

- Removal of communication roadblocks about the website between the CP and the technology consultant
- Decreased costs of maintaining the site
- Increased time for Sharon to create site to be more of a marketing tool by decreasing time needed to call and wait for the consultant

Measurements of success:

- CP will understand and know how to maintain and make proper updates
- CP will maintain site and make proper updates
- Little to no invoices to the technology consultant concerning the website

Currently, there is no measure to monitor cost savings and delays caused by the technology consultant.

Additional Impact

With the new web host, the management of the web host will now be transferred from the technology consultant to the CP, a member within the organization. While the CP will now have more responsibilities, costs of utilizing the technology consultant will decrease. Having someone within the organization manage this host empowers the organization to be more self-reliant.

Feasibility

According to preliminary research, this transfer of domain implementation and use of the site through the new host can happen immediately. However, proper research should be conducted and further research should be done to ensure the right managed host is chosen. This research is estimated to be finished in less than a week.

The CP is extremely excited that she will no longer need to rely on the technology consultant for the administrative details of the website. She also mentioned that there are funds available for this virtual host. Since this will be a learning experience, by the time the student consultant leaves, the CP will be fully equipped with the skills to maintain the virtual host making this endeavor very sustainable. While the student consultant does not currently have the full understanding of how to use a virtual web host, the student consultant strongly believes that she will be able to learn and relay this knowledge to the CP.

A risk using a virtual host is that the organization will be fully relying on the host's servers as well as the internet. If the server shuts down and the organization has not backed up their site on their local machine, the website will be permanently lost. While the internet can be found elsewhere such as the home or the library, the first risk can be mitigated by properly backing up all information that is placed out on the host.

Task 2. Use website to market to and inform potential donors

Although the website is purposed for marketing the organization and informing potential donors, the website lacks user friendliness and appeal. The CP needs to add more elements to the website that would increase its use as a marketing tool such as user-friendly appeal, membership sign-up and newsletter sign-ups. However, due to the lack of understanding and knowledge of the technology, she cannot make these changes to the website. A CMS, content management system, would provide an easy way to implement these changes and updates without increasing the need to be extremely technical. A CMS allows a user to create, edit, delete and publish content in a consistent and organized way. A CMS has many of the common features that a user would use on a site in a WYSIWYG (what you see is what you get) editor so that users would not have to interact with code directly but instead can use a end product preview to create, move, edit and delete elements on the page. According to preliminary research, many CMS have database management capabilities, which will allow for an easy method to manage information coming from various parties.

One of the main tasks of the website is to promote and market the society to ensure that others are aware of an opportunity to help through the organization. Having a greater marketing tool will bring in more donations and more people that can provide their time and services. Basically, this online tool can provide more avenues to expand the organization to help more people.

The following benefits can be foreseen with the use of a CMS:

1. No need to be extremely technical to make updates, which would save time on having to learn the technical environment or programming languages.

2. CMS's provide security measures as well as patches for continued security, which would help protect data as well as the users.
3. There is a high support system that would provide means to get questions answered if the CP needed.
4. CMS's that have a large user community are constantly being updated and improved. Therefore, CP would easily be able to find templates, skin and plugins to enhance the site.
5. CMS's provide SEO (Search Engine Optimization) capabilities that help users find the website.

With these aforementioned benefits, the website will be furthered as a marketing tool. With enhancements to the website such as the use of SEO, a newsletter sign-up section and a user-friendly design, the website will further increase awareness, which will increase funding. With the SEO feature, more users will be able to find and come to the site because of the greater pool of users knowing that the site as well as the organization exists. Also, with a newsletter sign-up section, more people can know about what is going on with the organization with frequently updated newsletters. The organization does a lot of great things and potential donors may feel more compelled to contribute to the organization knowing all the things they do. With a user-friendly design, people can navigate through the site and find information more easily.

Expected outcome

- Increased usability of site
- Increased visibility of site with use of CMS's SEO feature
- Increased visual appeal of site
- CP fully equipped with tools to maintain and update site
- CP knows how to find solutions to problems with CMS

Measurements of success:

- Increased traffic on site
- Increased awareness of organization
- Increased donations through site
- CP can create content, pages and templates on her own
- CP can find solutions to her questions without student consultant

Additional Impact

This tool will actually impact the organization in a positive light. Since open source CMS is free, a budget will not have to be set for it. This tool will actually lessen the paper load of requests for newsletters and annual report forms. Since this is a technology implementation, there is no foreseen changes to the facilities besides the lessened need for storage space for paper. Currently, this implementation will not affect any other administrative office members. However, the potential capabilities that CMS can provide as well as the ease of use may sway some of the other members into buying in to this system such as the FC's interaction with the stores. The stores fax hand-written daily sales report forms and the FC must then compile and input this information into Quickbook, which often causes frustrations in the lack of completeness and legibility. With an easily implementable online form, the website can be used to capture information from the stores.

Feasibility

The estimated time for this implementation is four weeks. While launching a site using CMS will not take four weeks, to make this a sustainable effort, the CP must be comfortable with the basic functions of the CMS software. With an open source CMS, tutorials and much support can be found online to ensure that the CP will be able to find solutions to her problems. Before the student consultant leaves, she will ensure that the CP is comfortable looking for support on her own and know where to find the support when needed.

A CMS that is easy to use for a non-technical person will be chosen to ensure that the CP can easily learn how to use the software. The student consultant has also been working on tutorials and reading support to ensure that she has the proper skills to teach the CP how to use the CMS.

Cost will also be considered when choosing a CMS. There are currently many open source CMS that provide an excellent support system as well as a good number of tutorials that will help the CP learn and maintain the website. Since an open source CMS will be used, there is no monetary cost of implementing such a system. The CMS that is chosen will be greatly dependent on the platforms of the web host. Once the web host is chosen, one week will be used for researching CMS and choosing the proper one. Three weeks will be used for learning the CMS.

The greatest risk of using a CMS lies in the failure of the CMS. However, the site is easily exportable so that it can be transitioned to another platform or perhaps even a simple HTML. The student consultant will teach the CP about backing up information, which will mitigate this risk. Some other risks lie in rejection of the technology; however, after an initial discussion of the technology, the CP remains excited to learn about this technology.

Task 3. Increase organization of data

Currently, the CP manages data for district councils, district council officers, conferences, conference officers, Vincentians and newsletter recipients. She manages all of this information in a series of spreadsheets. However, some information is duplicated in cases such as a newsletter recipient that may also be a Vincentian or a Vincentian that may also be a district council and/or conference officer. She uses the information on this list to create mailing lists to send publications and/or forms to recipients. Sharon needs to send mailings to specific members, conferences or district councils. However, she must search through the entire list to find all those that need to receive the mailings. For example, Sharon communicates with mostly the conference presidents from the entire conference officer list. So, she must manually search for all conference president's addresses within the conference officer spreadsheet. The spreadsheet is not set up for autofilters or sorts. She would like a database that would show these relationships so that she would not have to manually look through multiple spreadsheets to find the expected mailing list recipient. In the time that it takes her to look for all the information, she could be focusing on the actual mailings that will make an impact for the organization such as the newsletters that inform potential or current donors or annual report information that will be viewed by potential or current donors. Informing donors of all everyone they help will help the donors be more interested in contributing to the organization.

Using a customer relationship management (CRM) tool will allow the CP to have the benefits of a database including creating these relationships without needing to be fully versed about databases as well as technical database languages. Unlike databases that use SQL or an additional language, CRM's allow users to associate and create relationships based on human language. This allows the user to organize the information by creating relationships, which in turn will help the user to search for data more effectively.

With spreadsheets that allow data elements to be deleted and moved so easily without confirmation, sometimes information can be lost within or even from the spreadsheets, which could translate to a loss of donations and decreased awareness. With this money and awareness, more people could be helped either monetarily or through services that someone can provide.

Expected outcome

- CP will no longer need to manage multiple spreadsheets for a contact database
- CP will be able to find all necessary contacts in less time

Measurements of Success:

- Less time will be spent on using spreadsheets for mailing lists
- CP will know how to use CRM and understand benefits
- All mailing list information will be in the CRM database

Additional Impacts

A CRM can be used for far more than just mailing lists. If the benefits are clearly outlined and accepted by other employees, the entire organization can start to use this system to increase efficiency and unify platforms between different job functions. A CRM will also be helpful when launching the membership sign-up and newsletter sign-up section. The CRM will be able to manage the list in its own database decreasing the workload for the CP. The CRM can also be used to do mass-mailings so that communications between the organization and those that are interested increase. Increasing this communication will allow donors and members to be constantly aware of opportunities to help furthering their mission to more people.

Feasibility

The estimated time of completion is 3 weeks. However, the learning can be done in parallel with the CMS learning. One week will be used to explore potential solutions and choose the best possible CRM for the organization. From preliminary research, the student consultant found many CRM's that are easily implemented with a CMS. The CP is eager to find that there is a solution to her hard to manage spreadsheets without having to reinvent the whole wheel. She is excited to learn how to use the software.

The chosen CRM will be one that has a high support system and online tutorials to encourage learning as well as ease learning to ensure sustainability. A CRM is an easy to use solution requiring little to no technical experience making certain that the CP will be able to learn how to the use the CRM. Also, the student consultant has been researching, working on tutorials and exploring CRM solutions through demo sites to ensure that she has the proper skills to help the CP. There are also many open source CRM's which will make this a cost efficient solution.

The greatest risk in this approach is again the failure of the CRM. The CP will now be fully relying on the CRM to hold all of her mailing list information. To mitigate this risk, the student consultant will teach the CP how to properly back up all of the information within the CRM to ensure that in the case of a failure in the CRM, the damage is little to none.

III. Outcomes and Recommendations

I. Outcomes

A. Task 1. Decrease reliance on technical support

The original task was to transfer the website from the current host to a new host that would managed completely by the community partner. The expected outcomes for this task were as follows:

- Less reliance on technology consultant for website matters
- Removal of communication roadblocks about the website between the CP and the technology consultant
- Decreased costs of maintaining the site
- Increased time for Sharon to work on the site to be more of a marketing tool by decreasing time needed to call and wait for the consultant

After careful consideration of the options, the executive director and the external technology consultant decided not to implement this solution. Throughout the semester, the student consultant and the community partner worked toward recognizing problems whether that meant with the web host, web site, miscommunications or desires to have some feature or be able to do something with existing technology. Now, the community partner first queries and researches her problems via the web, she can communicate her problems more clearly to the technology consultant. Since the technology consultant no longer has to identify the problem, it is projected that he will be able to fix the problems in half the time. Knowing this, the community partner will now be able to focus on her work such as making the site more of a marketing tool with the decreased stress and wait times caused by running into problems with the host. No such outcomes were observed by the student consultant since a problem did not arise during the semester.

In addition, the community partner realized the importance of being prepared before getting started on a project. She alluded to the fact that although she wanted to make changes to the website, she was not aware of needing administrative rights to make such changes. In light of occurrences like these, she was able to note that in future projects, she would prepare so that the project can go smoothly without inefficiencies due to logistics.

The overall mission of the organization is to support and provide for those in need whether that is through monetary or in-kind solutions. The organization heavily relies on external partners to make these contributions that will be given to those in need. Before, when the community partner experienced problems, she would often need to wait a week or two before the problem was solved. This meant that within these two weeks, she would not be able to update the information on the site. Although the site is not updated every two weeks, during this period, Sharon could potentially not be able to update essential information. A vital piece to the organization is to inform donors the current situation as well as means of ways they can help. The fastest way to make this information readily available is through the web and now with this increased capacity of being identify and fix problems faster, the community partner is now able to reach more people in a smaller amount of time. Also, with a decreased cost of relying on the technology consultant, there is more funding that can be used to support those in need (clients).

The organization has decided to retain the technology consultant to maintain the web host. However, the organization and the community partner is aware of the research that has been done by the student consultant. This research remains with the organization in the event they would like to make the switch in the future. In addition, this outcome is sustainable since the CP is now equipped to ask good technology questions as well as identify problems that will help the organization.

B. Task 2. Use website to market to and inform potential donors

The second task was learning and transitioning the current web site to a content management system. The expected outcomes of this task were as follows:

- Increased usability of site
- Increased visibility of site through the use of SEO (Search Engine Optimization), which allows internet users to find the site more easily through the use of keywords
- Increased visual appeal of site
- CP fully equipped with tools to maintain and update site
- CP knows how to find solutions to problems with CMS

Throughout the semester, the community partner learned the capabilities of the content management system as well as learned how to use it. Throughout the semester, she has learned about CSS (cascading style sheets) and what it does, HTML (hypertext markup language) and how it works, CMS and its benefits and finally Joomla! and how to use it.

The community partner has worked with the student consultant to achieve the following:

- She created, modified and deleted more than five pages as well as the content
- She has also manipulated menus to create more than five menu items as well as two additional menus in different locations on the page
- She created three member only pages as well as the navigation and login modules
- Sharon also searched for, installed and implemented multiple templates

Sharon found the site to be easy to manage. She was able to replicate the content of half of the prior site, including articles, navigation links, and member's only sections. Each site modification was done five or more times and did not require assistance. Therefore it appears the CMS would be a viable solution for Sharon to manage. Besides the logo, template and few of the new additions that will featured such as publications, the site has been almost entirely replicated on the test environment.

Sharon has also adapted to google forms, which allows her to implement forms on the organization's website. After the initial session with the student consultant, Sharon successfully created and linked the created form to the website [Exhibit A]. Sharon has also realized that google provides comprehensive tutorials that will help sustainability of this technology in the future. She has also learned how to use google docs, which allows her to export any information from the forms to a local excel spreadsheet file. With the creation and link of the form, users are now able to sign up for newsletters from the website. Although no one has signed up so far, the CP projects that many more people will be willing to sign up in the future. The CP has been so impressed by this technology she has decided to include this technology in the newsletter so that other Vincentians can benefit.

Now, with this increased capacity of knowing and understanding technology as well as the ability to have additional potential donors learning about the organization through newsletters, the organization would be able to better serve their clients. The organization has been a great contribution to the community and through the newsletters, people will learn more of the great things the organization has done and contribute what they can. With increased donations, more clients will be able to get the help they need. The knowledge and understanding technology as well as its potential will help the organization utilize it to reach out to potential donors that have not been reached out to before. One of the greatest aspects of this increased capacity is that Sharon now understands that she can utilize existing technologies and these technologies actually exist. She can seek these opportunities through tools like the google search engine. Sharon now knows where to find what is needed.

The organization is postponing adapting the Joomla! CMS solution for their website pending the approval of their technical consultant. In the event of this situation, the student consultant has left a tutorial of commonly done actions on the Joomla! system [Exhibit B].

Again, this solution is sustainable in that Sharon is now more knowledgeable about technology. Also, since google offers comprehensive tutorials and online help, this solution of google forms will be very sustainable for the future.

C. Task 3. Increase organization of data

The third task was implementing a CRM to decrease the time and effort to manage multiple spreadsheets of contact information. The expected outcomes for this task were as follows:

- CP will no longer need to manage multiple spreadsheets for a contact database
- CP will be able to find all necessary contacts in less time

In researching CRM's, CiviCRM was chosen on the basis that it was free and it was specifically designed for non-profit organizations. While other CRM's offered free non-profit versions of their application, these applications were not meant for non-profit organizations so there were either too many features such as sales information or not enough features such as donations and assistance. In addition, CiviCRM was an application that could easily be integrated with Joomla! CMS.

CiviCRM was implemented in the test environment. With CiviCRM, the community partner is able to change the information of one contact/entry without having to search through the rest of the spreadsheets to make necessary changes to any redundant information. She has learned and used on her own without the student consultant how to import, create, update, delete as well as create and use a data map to effectively and efficiently use the CRM. CiviCRM also offered options of customizable fields, tags and groups. Since the organizational structure of the conferences and districts include both the prefix of Sr for sister and the title spiritual advisor, the community partner was easily able to include these fields. After customizing fields, Sharon imported over 100 records and modified the system to what she needed. To increase understanding and use, all data was removed from the system and was imported by the community partner without the help of the student consultant.

As the information coordinator, it is vital to the community partner's role to relay necessary information to the rest of the organization. Without this information, the organization would remain disorganized and less effective. The conferences are responsible for making the house calls and determining the needs of an individual. If the Society no longer held the information for these conferences, then fewer people will be helped which threatens the ability to reach the full potential of the organization's overall mission. Sharon now knows of software that can help her manage her data without having to learn databases as well as the technical language that goes along with it. Also, she understands the importance of well organized information so she has gone through and cleaned up her spreadsheets to make them easier to look through. In addition, she has also learned from the student consultant how to create filters in an excel spreadsheet, which allows her to easily search multiple data items within the same spreadsheet.

On the advice of the technology consultant, the organization decided not to adapt the CiviCRM solution. Consequently, an additional task of exploring database design was taken on. The community partner has successfully created that design [Exhibit C] and submitted it to the technology consultant. When the technology consultant creates and returns the database to Sharon, she will be able to search, modify, add and delete exactly how she expected to. The CRM could be of use to the organization in the future since the organization is growing. Now that the community partner is aware of the available software, if the organization chooses that a CRM will be the better avenue, they will have the option and the knowledge to go forth with the decision. In the beginning of the semester, the CP had said, "I know how to use an access database but I have no clue what relationships are". Recently, when the CP and the student consultant was building the database design, the CP was able to create those relationships without much direction from the student consultant. The CP said, "Using CiviCRM has helped me realize what relationships meant in databases". This is a prime example for how there has been an increased capacity through this task.

In addition, the community partner has been able to decrease some of her tasks by 66% since she now does tasks once instead of thrice. Through this engagement, the community partner has realized the importance of having a single repository for data. She noticed that there were inefficiencies between all the departments since each member was using information without validating to see that everyone had the same information. Many tasks therefore were duplicated and some were based on incorrect information. She realized the importance of communication and coordination of efforts. Knowing this, she can now approach future endeavors with a clearer outline of what needs to be done.

II. Recommendations

A. Vision

In the future, the organization will ideally be able to 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 2007 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. Persuasive Case

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. Persuasive Case

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 in 2009 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

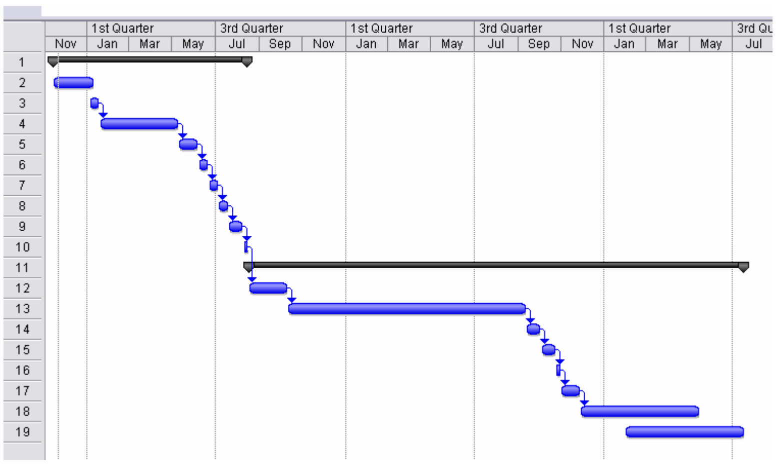
All resources are free if a free CRM is chosen. The student consultant recommends salesforce.com's non-profit CRM. Also, the information coordinator already has a digital camera that she can use to record videos for the webcast for help on the annual report forms. She can simply upload these videos using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



About the Consultant

Hannah Lee is a final semester graduate student in the Heinz College pursuing a master's degree in information systems management. She was part of the accelerated masters program at Carnegie Mellon University and received a bachelor's degree in business and human-computer interaction. She will be starting with Booz Allen Hamilton in the summer of 2009.

Exhibit A

The following is a layout of the administrative office of Society of St. Vincent de Paul.

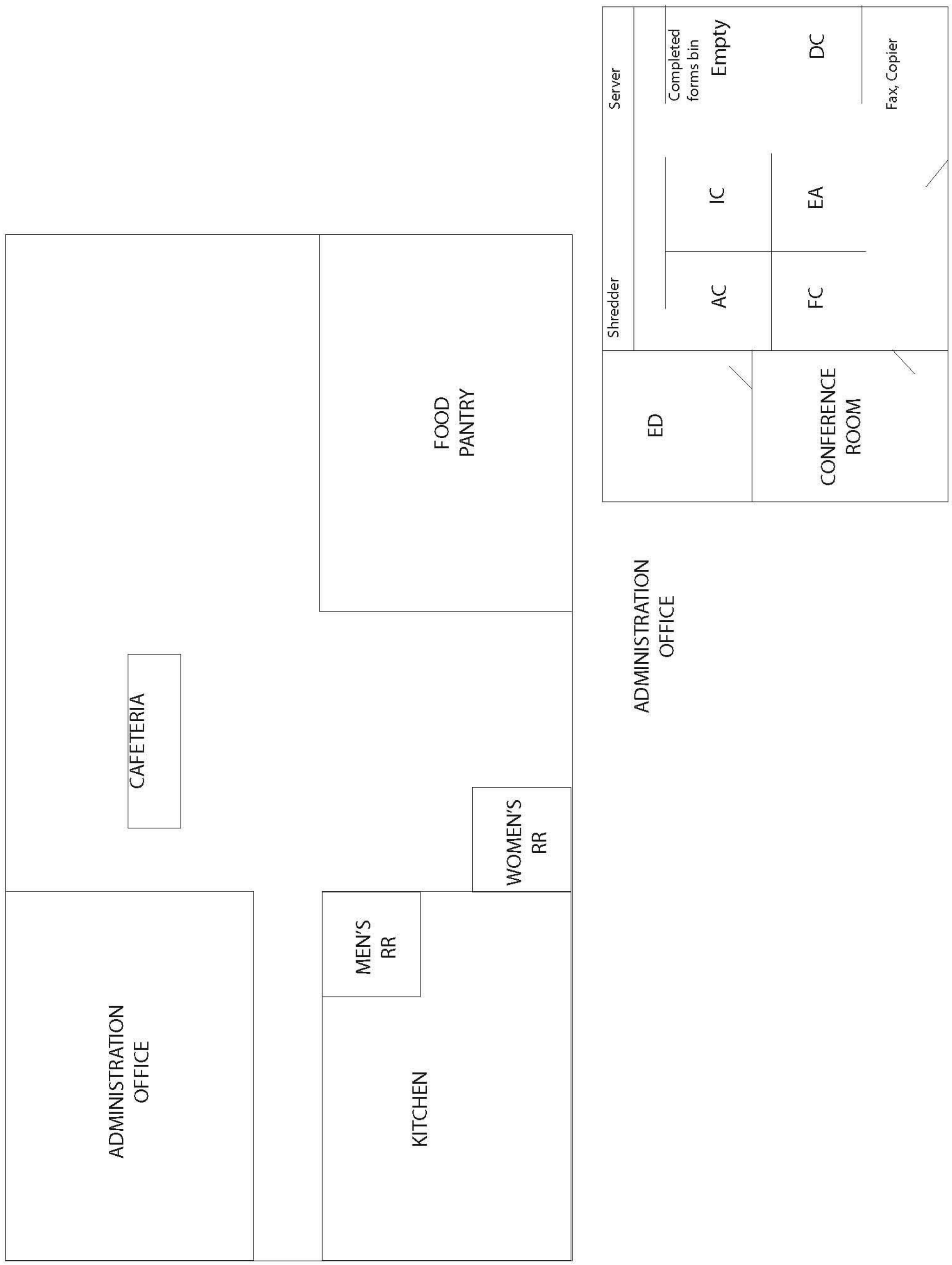


Exhibit B

The following is an example folder on the CP's documents for mailing lists.

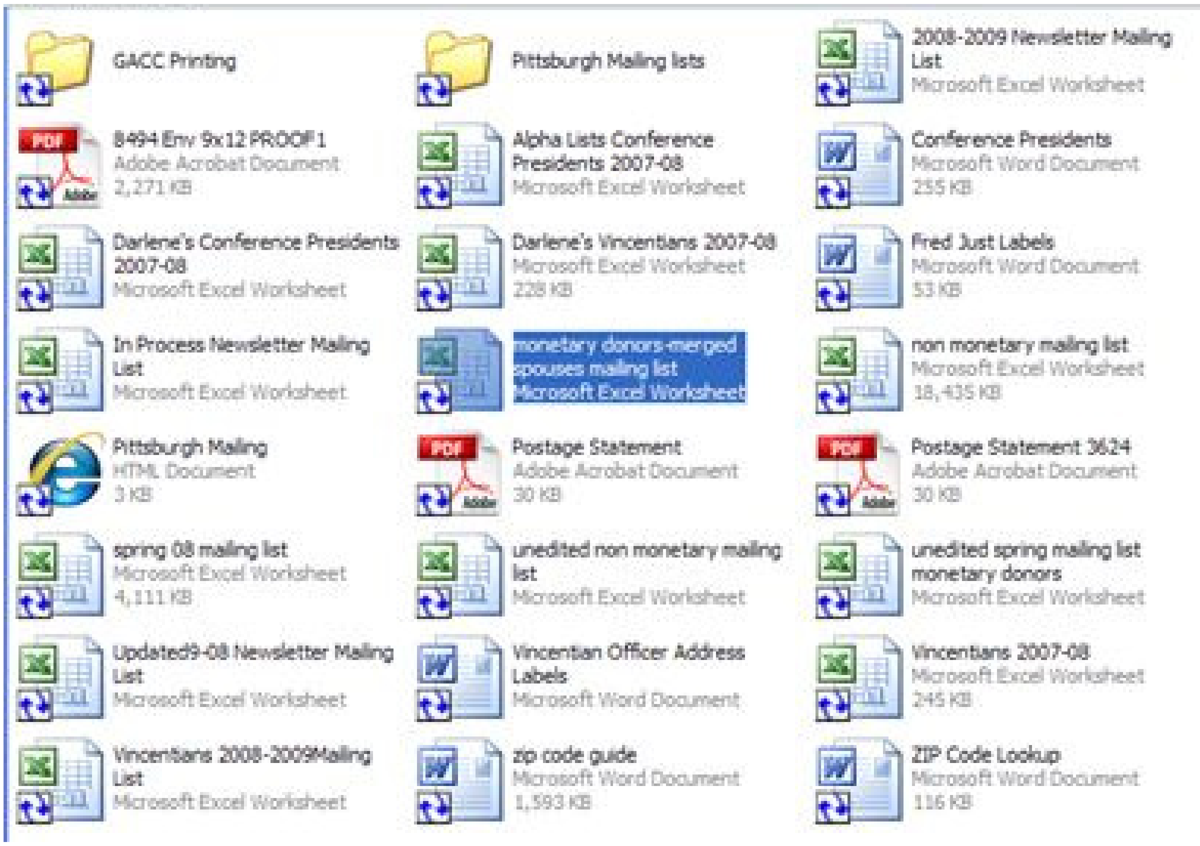


Exhibit C

The following is the first page of the annual conference report.

SOCIETY of ST. VINCENT de PAUL U.S.A.

2007

ANNUAL CONFERENCE REPORT

PLEASE RETURN THIS FORM TO: ______________________________ **BY THIS DATE:** ___________________

CONFERENCE NAME: ____
(PLEASE PRINT OR TYPE ALL RESPONSES)

ADDRESS: ____
Street City State Zip

REPORTING PERIOD FROM: ______________ TO ________________ (12 MONTHS)

FREQUENCY OF MEETINGS (CHECK ONE): WEEKLY ____ EVERY OTHER WEEK ____ MONTHLY ____ OTHER ____

IS THERE AN ACTIVE SPIRITUAL ADVISOR (CHECK ONE): YES ____ NO ____

MEMBERSHIP*

(*Ethnic breakdown required for government reporting, grant applications, etc. Please assign each member to one category only.)

	Asian	Black	Caucasian	Hispanic/Latino Origin	Alaskan Native/ American Indian	Native Hawaiian/ Other Pacific Islander
Active – under 40						
Active – 40 and over						
Total Active						

	Asian	Black	Caucasian	Hispanic/Latino Origin	Alaskan Native/ American Indian	Native Hawaiian/ Other Pacific Islander
Associate – under 40						
Associate– 40 and over						
Total Associate						

TOTAL MEMBERSHIP

Total Active	
Total Associate	
Total Contributing	
TOTAL MEMBERS	

TREASURER'S REPORT

BEGINNING BALANCE (REQUIRED)			$
RECEIPTS		**(PLEASE ROUND ALL FIGURES TO THE NEAREST DOLLAR)**	
1. Donations from Members	$		
2. Church/Poor Box Collections	$		
3. Fund Raising Proceeds	$		
4. Other SVdP Unit Contributions	$		
5. Other	$		
Total Receipts (1 thru 5)			$
Cash Available (Beginning Balance + Total Receipts)			+$
EXPENSES			
6. Those We Serve	$		
7. Disaster Contributions	$		
8A Domestic Twinning	$		
8B Foreign Twinning**	$		
****Attach contact list for Foreign Twinning Partners**			
Subtotal (A) (6 thru 8)		$	
9. Solidarity Contributions (Dues/Tithing)	$		
10. Contributions to Upper Councils	$		
11. Operating Expenses	$		
12. Other	$		
Subtotal (B) (9 thru 12)		$	
Total Disbursements (Subtotal A + Subtotal B)			-$
Ending Balance: Cash Available – Total Expenses =			$

______________________ (___) ____________ ________
Signature of Treasurer Phone Date

P:\Annual Report\2007\Forms\Conference.doc

1

Exhibit D

The following is the first page of the annual report for (Arch) Diocesan Council.

2007

Annual Report of the (Arch)Diocesan Council

(Please return this form to the US Council Office.)

Fiscal year:	10/1/2006 – 9/30/2007	1/1/2007 – 12/31/2007
Deadline:	January 31, 2008 (120 Days)	February 29, 2008 (60 Days)

Reporting Period: From ______________________ to _______________________.

Please enter the address of the Council office:

Council Name:____

Office Mailing Address: _____________________________________ City: ________________________

State: _____________________ Zip code: ____________ Office Phone (____) ___________________

Office email address: ____

Is this Council Incorporated? Yes_____ No_____

Does the Council have its own 501c3?_____ Catholic Directory_____ Independent_____ None_____

Please answer the following about the (Arch)Diocesan Council:

How often does the (Arch)Diocesan Council meet?

Annually_____ Quarterly_____ Bi-Monthly_____ Monthly_____ Other_____

Number of Ozanam Orientations conducted in the (Arch)Diocesan Council: ________

Total number of Ozanam Orientation attendees: ________

Does the (Arch)Diocesan Council have a Spiritual Advisor? Yes_____ No_____

Total number of Special Works operated in the (Arch)Diocesan Council: _________

Please indicate Name of, People Served by, and Cost of the Council's Special Work Projects. If needed, record additional Projects on a separate piece of paper and include with this report.

Name of Special Work	# of People Served	Operational Cost
__________________________	_________________	$___________________.____
__________________________	_________________	$___________________.____
__________________________	_________________	$___________________.____
	Total People Served	**Total Operational Cost**
	_________________	$___________________.____

P:\Annual Report\2007\Forms\Diocesan Council.doc Page 1

Exhibit E

The following is the first page of the annual report to be filled out by the District Councils.

2007

Annual Report of the District Council

for the fiscal year ending 9/30/2007 or 12/31/2007

Please return this form to: ______________________________ by this date: ___________________

(District Councils unaffiliated with Diocesan Councils should submit this form directly to the National Council by January 31st for fiscal year ending 9/30, February 29th for year ending 12/31.)

Reporting Period: From ______________________ to _______________________.

Please enter the address of the Council office:

Council Name:____

Office Mailing Address: _____________________________________ City: ________________________

State: _____________________ Zip code: ____________ Office Phone (____) ______________

Office email address: ____

Is this Council Incorporated? Yes_____ No_____

Does the Council have its own 501c3?____ Catholic Directory ____ Independent ____ None_____

P:\Annual Report\2007\Forms\District Council.doc Page 1

Exhibit F

The following is an image of the website with an emphasis of the new link for newsletter created by the community partner.

Exhibit G

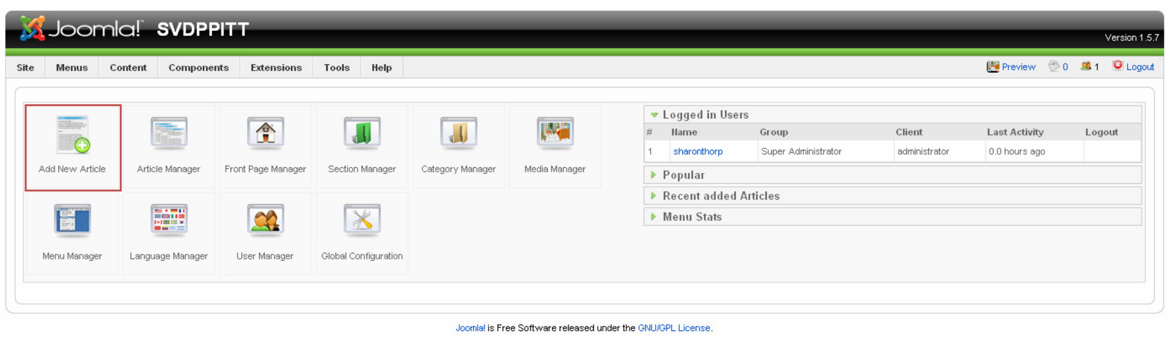
The following is the tutorial created for the organization by the student consultant. When the organization decides to go forth with the Joomla! application, they can use these tutorials to help them with the build of the site.

Administrator Website: tcinc.org/svdppitt/administrator

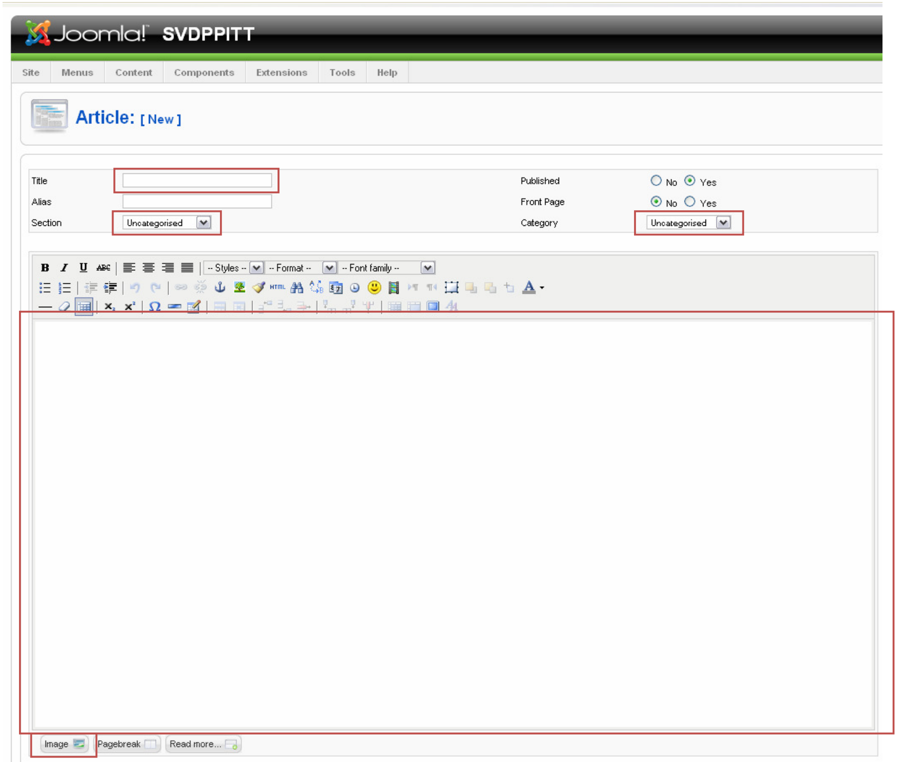
Tutorial 1: Adding a new article

1. Log-in to the site using
   username: sharonthorp
   password: svdppitt

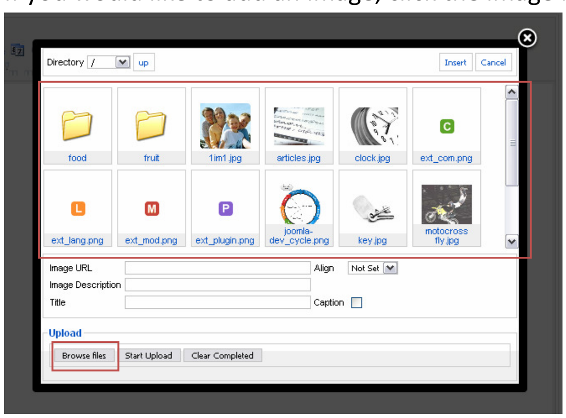
2. Click the add new article button on the control panel



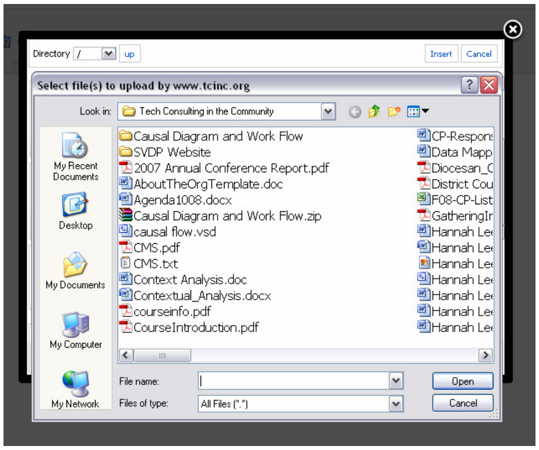
3. Add a title, choose a section, add content



a. If you would like to add an image, click the image button below the content text box.



b. Choose the photo or click browse to choose the photo from your computer



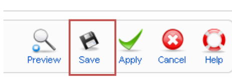
c. Once you've chosen the image, click open.
d. Click on start upload to load the image to the website
e. Confirm that the image has successfully been uploaded
f. Choose the photo from the photo thumbnails box
g. Click on insert to insert the photo

4. In Parameters(Article), choose the access level
   You have three choices:
   Public: Everyone can view it
   Registered: Only those who are registered can view it
   Special: Only selected few can view it

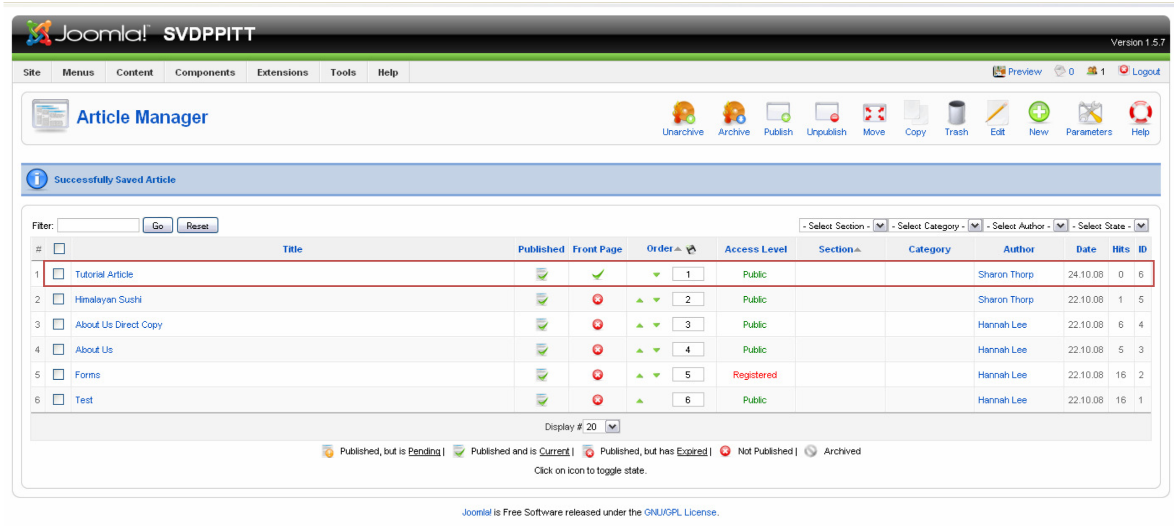
5. Click on Parameters(Advanced)
   You have three choices
   1. Use Global: Use the settings that you have set forth for all articles
   2/3. No/Yes: Override the global settings and use the one that you want for this article

6. Type in metadata information

7. Click on save



8. The article now appears in the article manager



9. Navigate to www.tcinc.org/svdppitt, the article should now show up on the front page

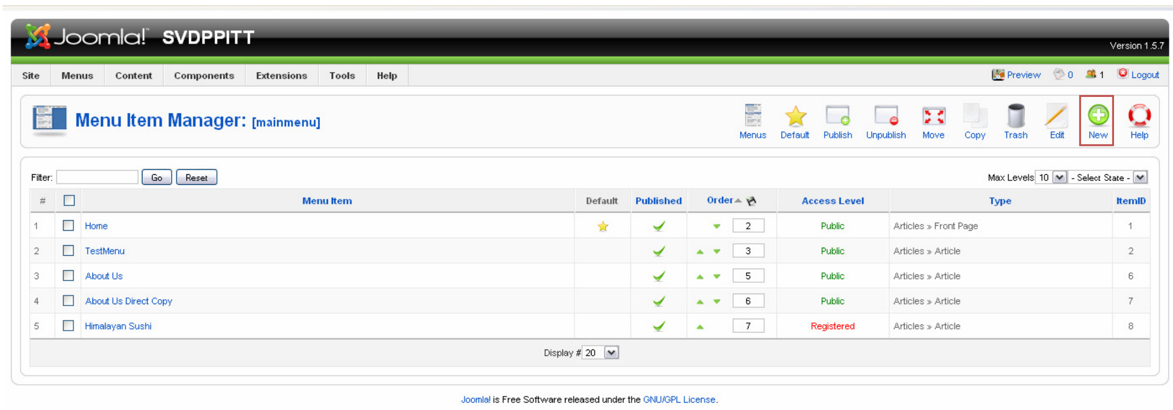
Extra reading:

1. Explanation of Joomla sections, categories and articles
   http://www.pathos-seo.com/joomla-basics/joomla-explanation-of-section-category-and-content.html
2. Explanation of Metadata and SEO
   http://www.teachmejoomla.net/joomla-mambo-tutorials-and-howtos/optimization-tips/joomla-seo-tutorial.html

Tutorial 2: Adding an article to the menu

1. In the top left corner, hover over the “Menus” menu item, and click on the “Main Menu*” item.

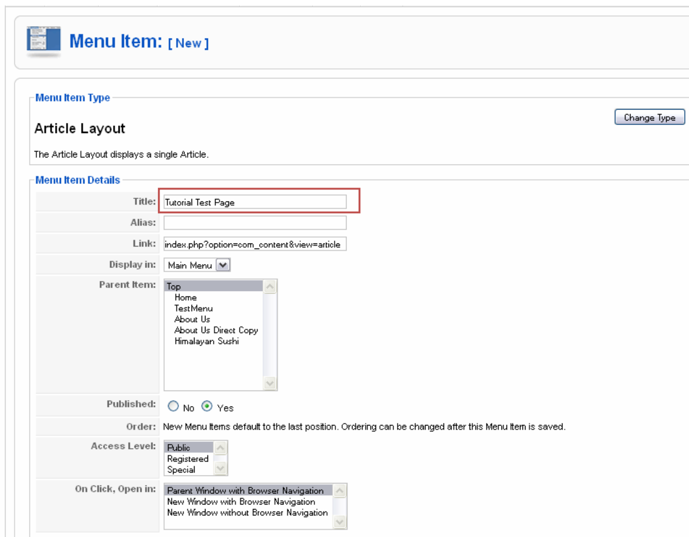
2. After navigating to the “Menu Item Manager: [mainmenu]”, click on the new button to create a new menu item



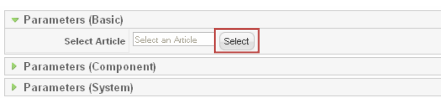
3. Click on “Article Layout” to use an article as a menu item

4. Enter the title and leave everything else as given unless you would like to make the following changes:

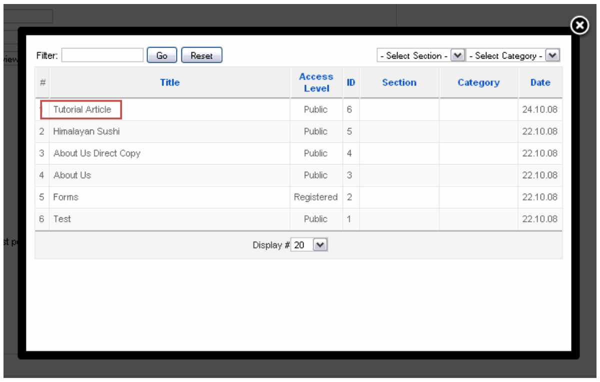
   a. Display the item in a different menu
   b. Change the parent item
   c. Keep the item unpublished until a later point in time
   d. Change the access level to public, registered or special
   e. If you would like to change how the page opens when you click on the menu item.



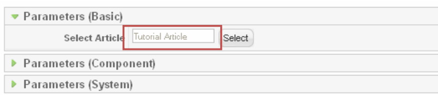
5. Click on “Select” on the right side of the screen to choose the article to have on the menu item



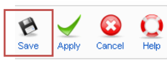
6. Select the article that you would like to place in the menu. In this case, select “Tutorial Article” by clicking on the title of the article.



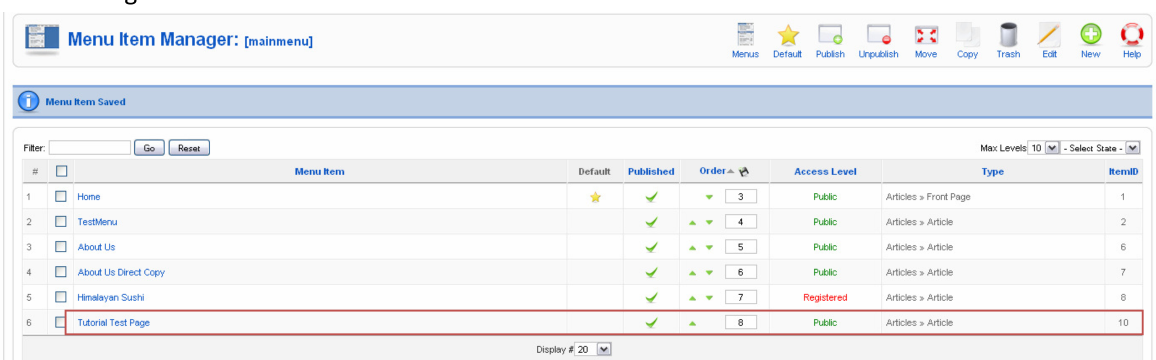
7. The title of the article now appears in the Select Article text box.



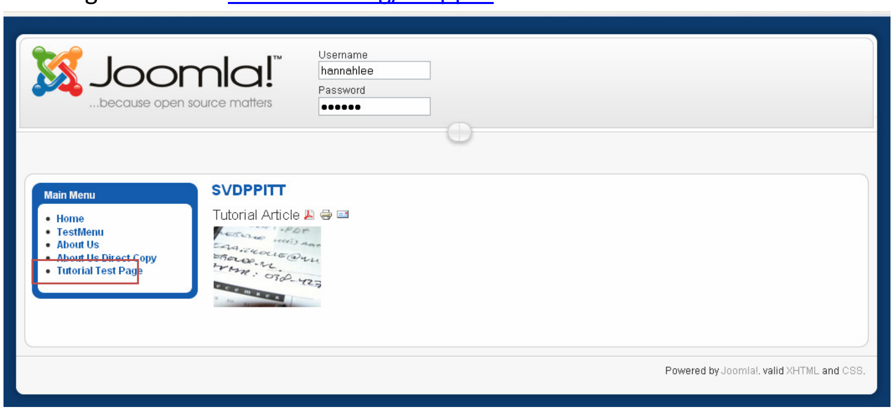
8. Click on “Save” in the top right area.



9. You will be navigated to the Menu Item Manager screen, and now you should be able to see the Tutorial Test Page in the list of menu items

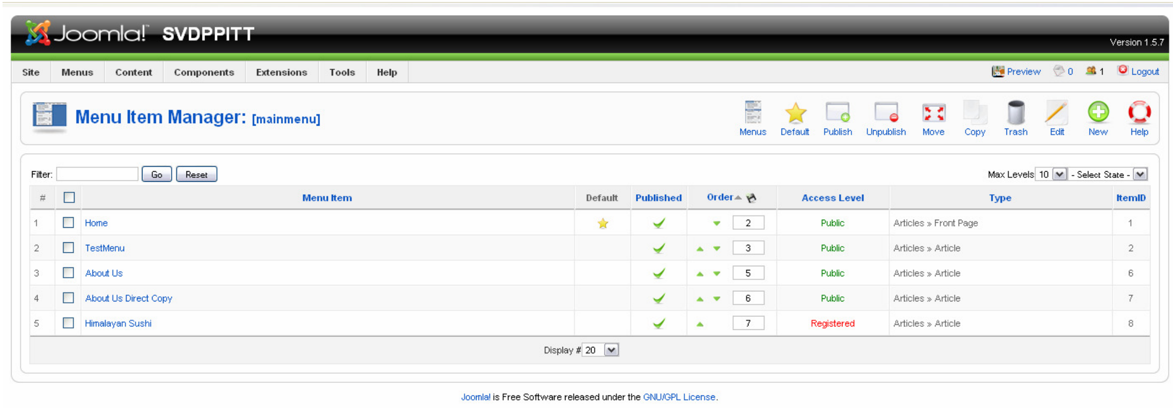


10. Navigate back to www.tcinc.org/svdppitt. You should now see “Tutorial Test Page” in your menu

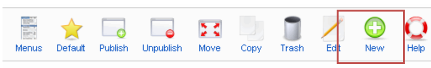


Tutorial 3: Adding a log-in to the menu

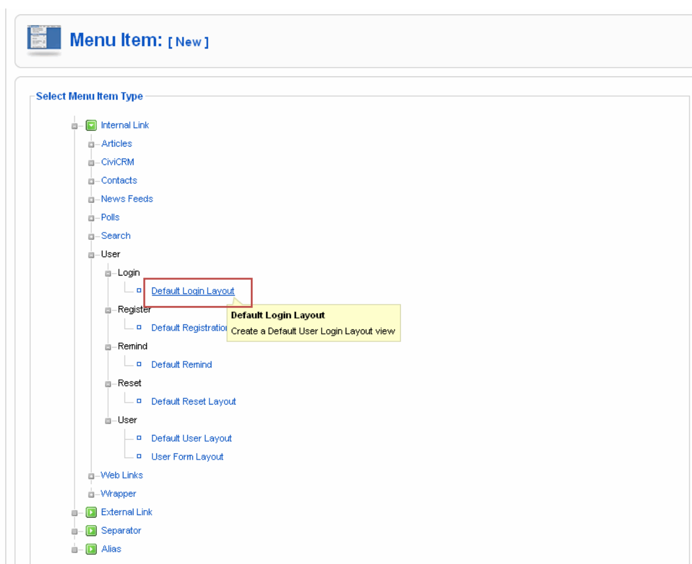
1. Navigate back to Menu Item Manager for the Main Menu



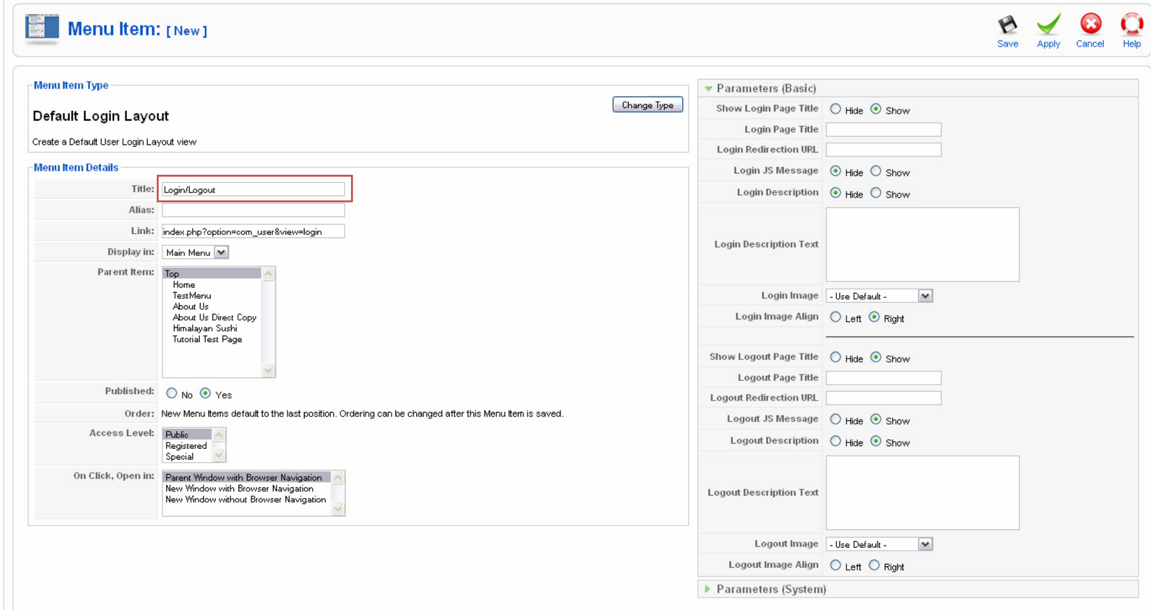
2. Click on the New button



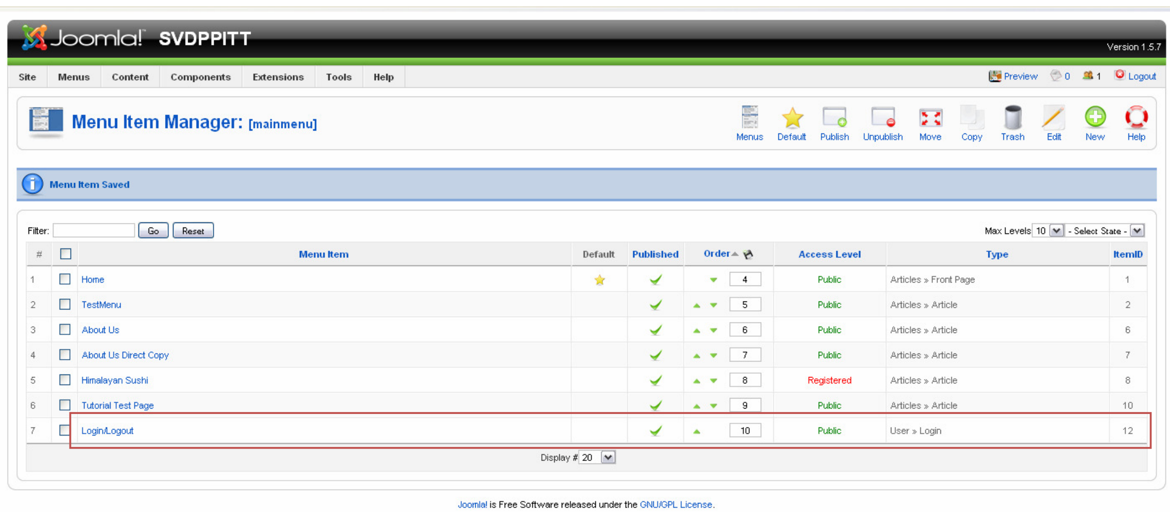
3. Click on the “Default Login Layout” under User -> Login



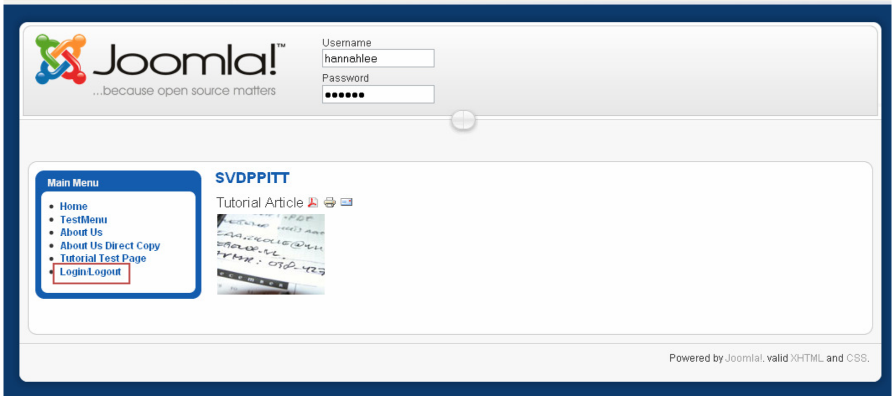
4. As before, fill out the title of the menu item, leave all other items as is.



5. You will be navigated back to the Menu Item Manager. You should now be able to see the Login/Logout menu item



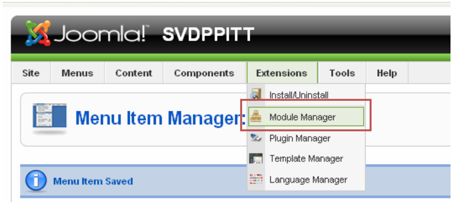
6. Navigate to www.tcinc.org/svdppitt and now you should be able to see the Login/Logout menu item



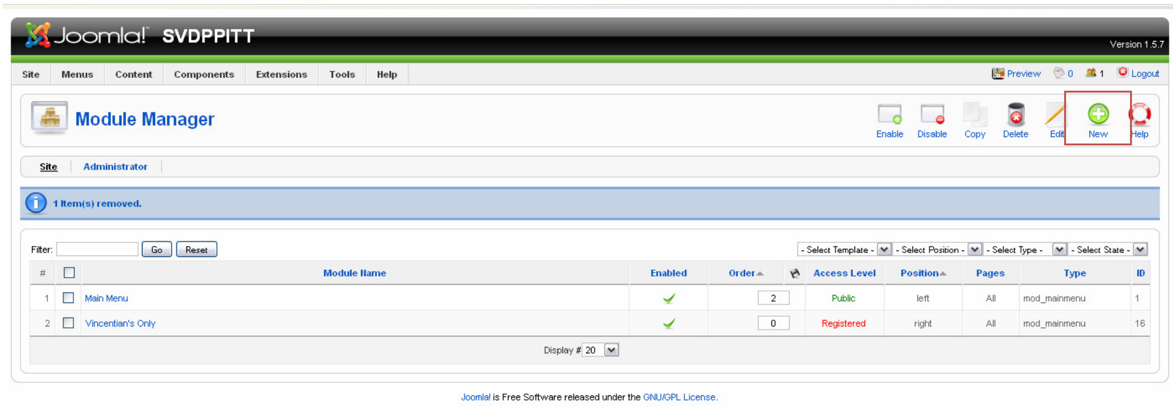
7. Click on the Login/Logout button, and you should be navigated to the Login page.

Tutorial 4: Adding a login to the page not the menu

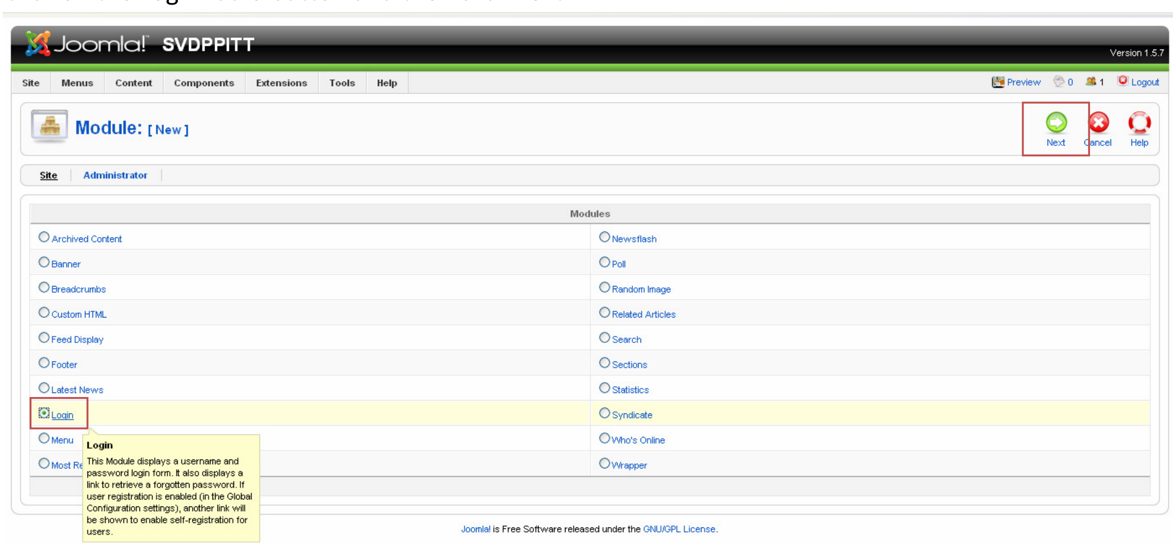
1. Hover over extensions on the top left corner menu and click on Module Manager



2. This is the Module Manager page. Click on the New button

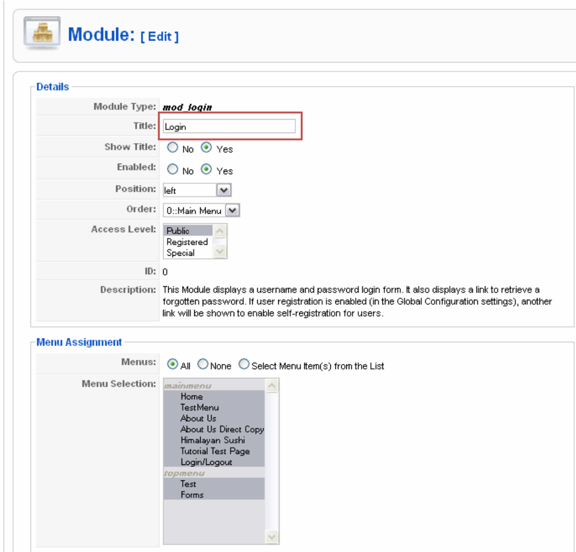


3. Click on the Login radio button and then click next

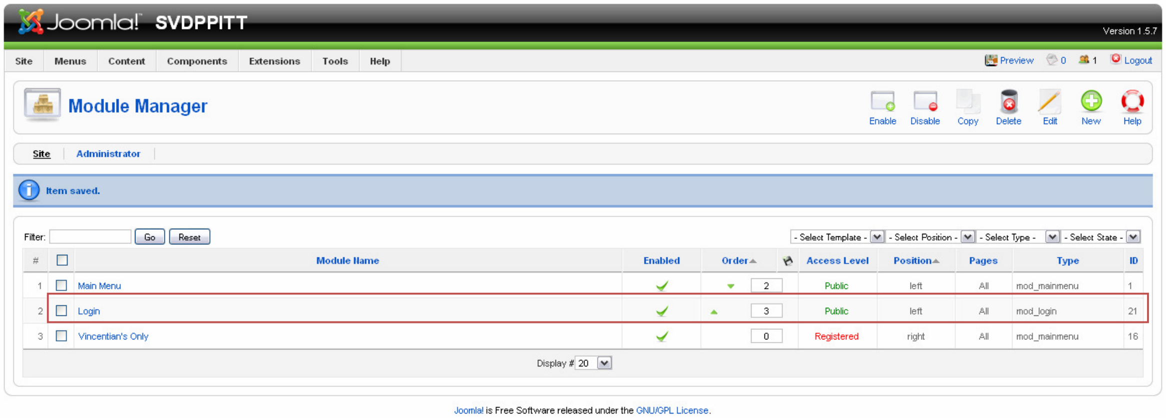


4. Add a title to the module and leave all other options as is unless you want to change the following:

    a. Don’t show title
    b. Disable the module until later use
    c. Change the position
    d. Change the order it appears on the page
    e. Change the access level of the module



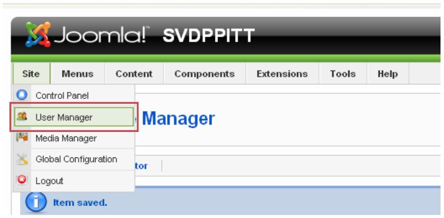
5. You will be navigated back to the Module Manager and now you should be able to see the Login module in your list.



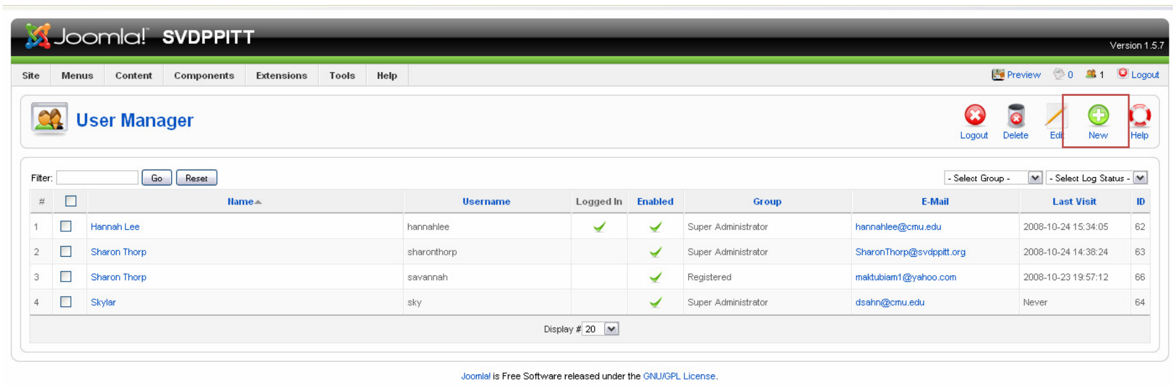
6. Navigate to www.tcinc.org/svdppitt. You should now see a login module under the main menu on the left side of the page

Tutorial 5: Adding a new user

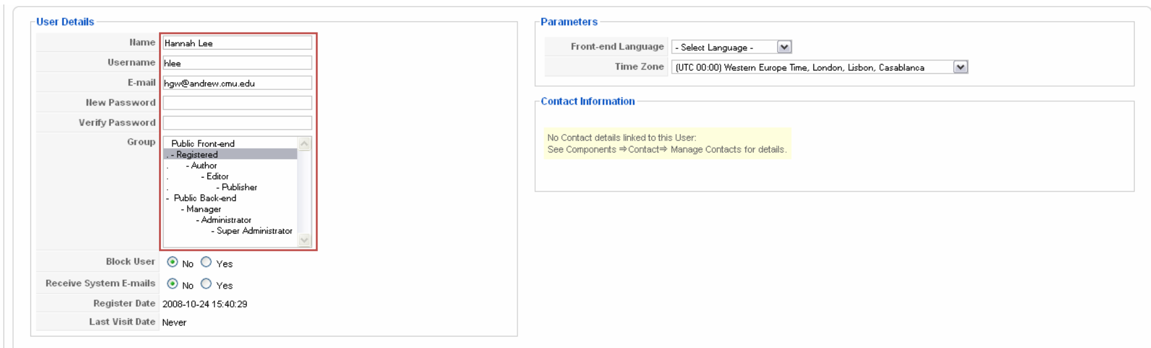
1. Navigate to User Manager using the top menu on the top left corner



2. After being navigated to the User Manager, click on the New button.



3. Enter name, username, email, password and password again. Leave all other fields as is. Here are the following user types:
    a. Users who sign in through the front-end will be your members
    b. Users who sign in through the back-end will be the managers/editors of the site



4. You should now see the new user in the user list

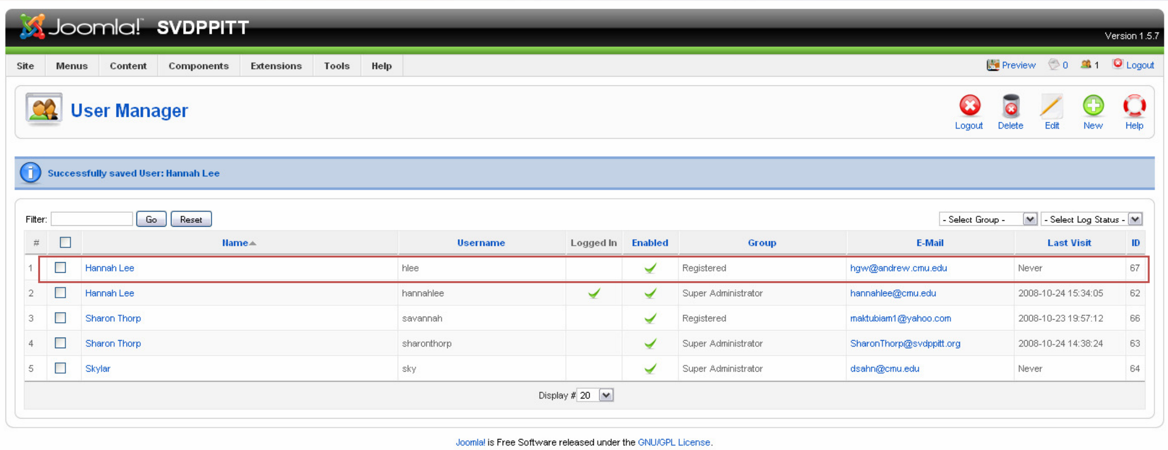
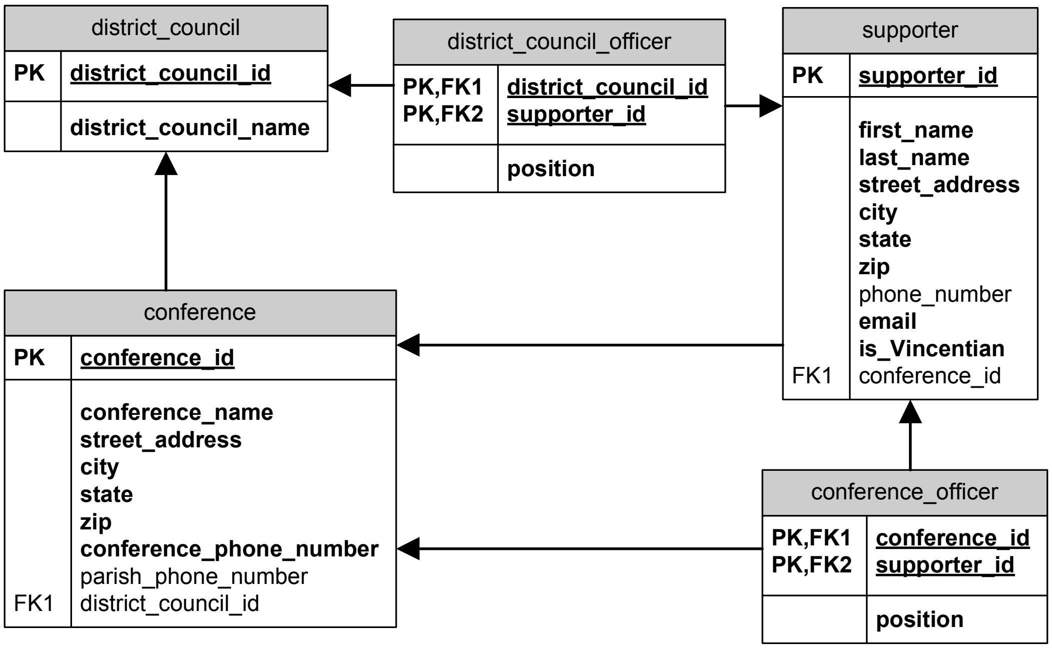


Exhibit H

The following is the access database design document created by the community partner along with the student consultant to submit to the technology consultant.

Access Data Design (Bold fields are required)



All Zip code information should be a numeric value of length 5. All phone numbers should be numeric values of length 10.

District Council

1. ID
2. Name of district council:

District Council Officer

1. District Council ID
2. Supporter ID
3. Office Held:

Conferences

1. Conference ID
2. Name of Conference:
3. Street address
4. City (Default: Pittsburgh)
5. State (Default: PA)
6. Zip
7. Phone # (Conference)
8. Phone # (Parish)

Conference Officers

1. Conference ID

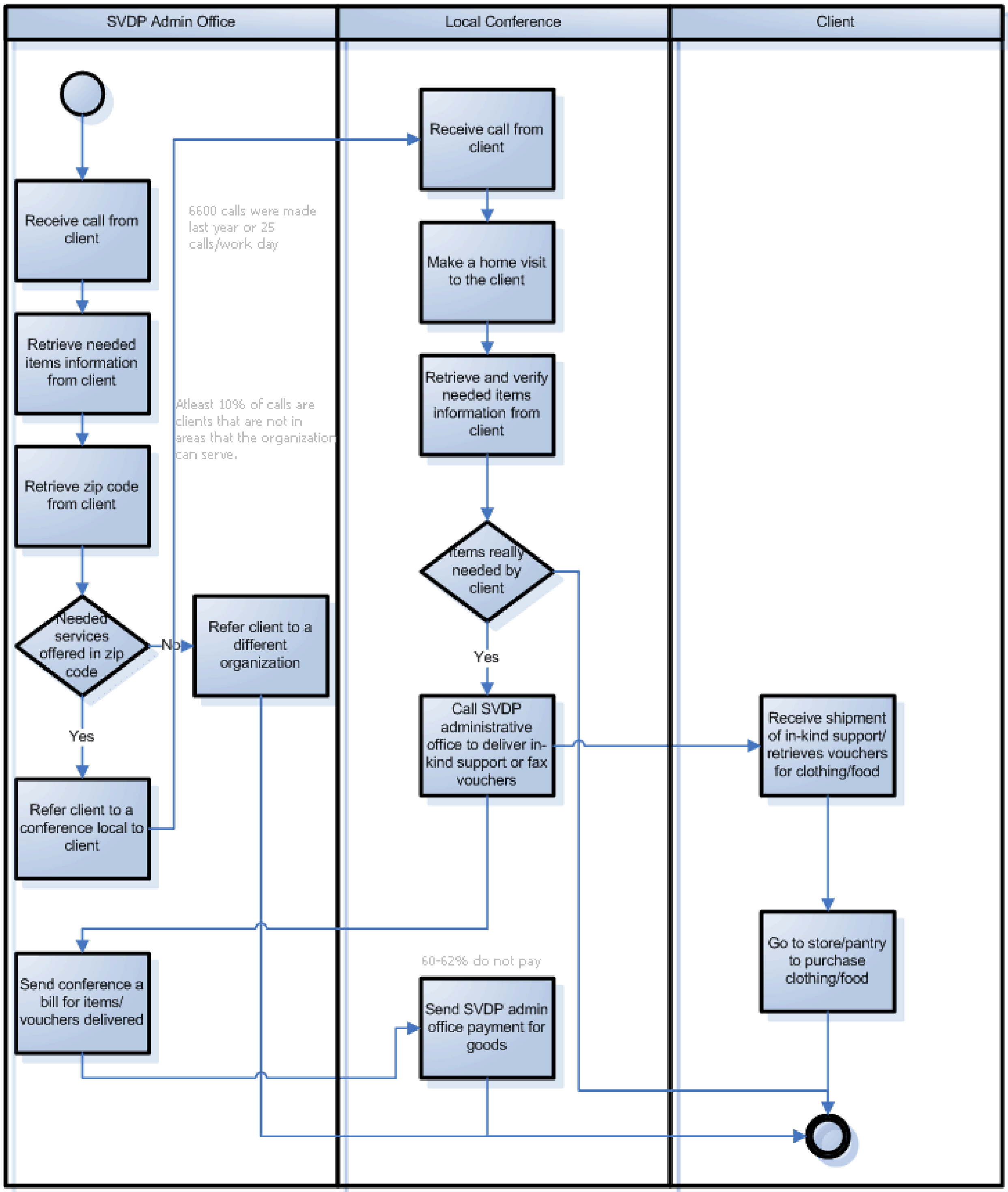
2. Supporter ID
3. Office Held

Supporters
1. Supporter ID
2. First Name
3. Last Name
4. Street Address
5. City
6. State
7. Zip
8. Phone # (non-required field)
9. E-mail address
10. Is Vincentian? (Boolean value of true or false)

Like the donations database, this database should have a simple user interface that allows:
1. List of all available physical addresses of supporters
2. List of all Districts
3. List of all District Council officers
4. List of all conferences
5. List of all conferences separated by District
6. List of all Conference officers
7. List of all Conference Presidents
8. List of all District Council Presidents
9. Search any table for any field
10. Insert new
11. Update any fields
12. Import functionality
13. Export functionality
14. Delete existing

Exhibit I

The following is the assistance process in the SVDP organization.



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