

**Mt. Lebanon Village**

**Yiming Zhang**

**Final Consulting Report**



# **Mt. Lebanon Village**

## **Executive Summary**

Student Consultant, Yiming Zhang  
Community Partner, Ann Bateman

---

### **I. Background Information**

Mt. Lebanon Village is a newly founded small non-profit organization that mainly recruits volunteers to provide transportation service for elderly members in the community. In addition to transportation services, Mt. Lebanon Village spends a lot of time trying to reach out to these elderly members and organize social events for them. The organization is in dire need to improve its information and technology management system in order to expand its services.

*The mission of Mt. Lebanon Village is to improve the life quality of their elderly members in the community by providing personal assistances and care.*

The student consultant's goal is to work collaboratively with his community partner and come up with a sustainable solution to the organization's problems.

### **II. Consulting Tasks**

As mentioned above, the organization needs to improve its information management. One of the tasks of the consultant is to revise their current database, which was deemed too difficult to use by the community partner. The organization should be able to easily manage the new database system as well as extract useful information from it to create detailed reports.

Second task for the consultant is to advise MLV regarding the usage of ClubExpress' service. Clubexpress is a company that specializes in providing various clubs and organizations with pre-developed website modules. They also provide database management for the organization's member information. MLV has asked the consultant to evaluate the their service on a technical level and provide a recommendation to MLV's board members.

### **III. Outcomes Analysis and Recommendations**

For the database tasks, the consultant revised their online Google volunteer service submission form in order to receive more useful data for fundraising purposes. The consultant has replaced MLV's current Bento system with Microsoft Excel. Excel is much easier to use and its pivot table function is able to create reports that Bento was unable to create. More over, Excel is similar to the Clubexpress' SQL database server. Since the board members have decided to move forward and purchase CE's service. Excel records transitioned smoothly to CE's database.

As mentioned above, the consultant has completed the report and recommendation for Clubexpress, and MLV's board have decided to sign up with CE and use their service. The website has been activated [www.mlv.clubexpress.com](http://www.mlv.clubexpress.com). MLV has decided to continue host its original website for the general public and use CE's site for internal use.

The consultant's first recommendation is the usage of Mac OS X' pre-installed Time machine application. This application would provide MLV with high-level recoverability to its local data. Since Excel records are stored locally, this is a very viable step for them to back up their data. More over, Time Machine is very easy to use and require just a one step setup for long-term use.

The consultant's second recommendation is to fully use the comprehensive manual which ClubExpress provides on its website. Even though Clubexpress manages most of the functionalities of the website, the website still requires basic administrative actions such as making surveys, add texts and images, set up bank account for donation transferring, and add/delete members. The manual include of 500 pages of detailed explanation of how to do every possible function on the website. Most important of all, it requires no programming or technical background, anyone should be able to manage the site using the manual.

---

**Community Partner**

Ann Bateman  
[mtlebanonvillage@gmail.com](mailto:mtlebanonvillage@gmail.com)

Mt. Lebanon Village  
710 Washington Road, Pittsburgh, PA 15228.  
<http://www.mtlebanonvillage.org>

Mt. Lebanon Village  
Yimino Zhang - Student Consultant

**About the Consultant**

Yiming Zhang  
[astudent@andrew.cmu.edu](mailto:astudent@andrew.cmu.edu)

Yiming is a junior in Information Systems.  
He interned as a Database analyst for UBS  
He will be interning at KBW as an IB analyst

Page 2 of 2  
April 29, 2011

# **Mt. Lebanon Village**

## **Final Consulting Report**

Student Consultant, Yiming Zhang  
Community Partner, Ann Bateman

### **I. About the Organization**

---

#### **Organization**

Mt. Lebanon Village is a non-profit organization that provides assistance services based on the senior citizen members' needs. Most services are transportation oriented, such as driving them to the hair salon, hospital, and grocery shops. The organization also informs the members about local theater, concert, lecture, and healthy/wellness events, as well as provides transportation to said events. Other services include home health and improvement referrals to the members. In addition, the organization host community events, they have the summer and winter games where local residents come together and spend a day playing team sports and cards/board games. They have been established for a year, and they currently have approximately 30 members. The organization charges individual members \$400 and couples \$600 annually. Other than the membership fees, it operates on various funds and donations. The organization recently joined a larger organization called Village-to-Village Network, which consisted of companies similar to MLV nationwide.

#### *Mission Statement*

*Become part of something special in our community. We are neighbors helping neighbors stay independent and to live in the homes they know and love*

#### **Facilities**

A small office located on 710 Washington rd. The office is on the bottom floor of the Mt. Lebanon municipal building. There is a receptionist-type of desk with a computer near the entrance, that's the office space of my CP. There is a side office with another computer, that's where the volunteer staff member works. In addition, there is a conference room once one passes the said desk and office. The conference room is equipped with an oval shaped table with 5 or 6 chairs, a coffee machine and a copier.

#### **Programs**

MLV's programs are divided in to three categories, membership programs, volunteer/board member programs, and community programs.

Membership programs are services provided to the registered members. The members phone in the office with a request, and the office would look for a volunteer that could assist the members.

Volunteer program is a process where MLV actively look for volunteers in the community. They would contact Mt. Lebanon residents and see if they can help out with office work or assist the members. MLV currently has roughly 10 board members, who organize summer and winter games. More importantly, board members are responsible for fund raising and make decisions for the organization.

Community programs are seasonal sporting events hosted by MLV to its members and Mt. Lebanon residents.

## **Staff**

The consultant's CP, Ann Bateman, is the only permanent on staff employee there, along with the occasional volunteers at the office. She takes requests from members and seeks a volunteer to fulfill them. She goes on meetings with people that are interested in joining the organization or volunteering. Basically, she handles all daily tasks other than data entries.

Board members are rarely seen in office, they meet once a month to make organizational decisions.

There are a few volunteers that work as staff members in the office. Their responsibilities and work time vary a lot. One volunteer comes in once a week and handles all of the data entries in to the system, and others answer the phone.

## **Technical Environment**

MLV current has two one-year-old model iMacs. The iMacs have Microsoft office tools and Bento installed. The Mt. Lebanon municipal building provides their cable and wireless Internet connections. The computers are mostly used for exchanging emails and keeping data.

## **Technical Management**

Their technology assistance comes from a high school student named Tyler. Their website was setup by a previous student consultant from CMU, named Lucy Li. There is no technical manager on staff and there are no clear documentations of technical management.

## **Technology Planning**

Technology planning is near non-existence. They have just recently considered developing a database so they could create reports for various funding sources. Since they have signed up with Clubexpress, Clubexpress maintains their website server and member database. The layout and contents of the website still requires MLV staffs to input them.

## **Internal and External Communication**

Internal communication are done primary by email and phones, occasionally they would meet in person.

Members contact the office by phone, and the office contacts the volunteers by phone. Occasionally, emails will be sent out to members and volunteers about upcoming events. Since the members are all retired elderly, they rarely check electronic communications. There is currently no newsletter type of communication.

The website is a great method of external communication. The website has a summary of the organization and contains various photos of members and events. The organization's contact information is available on the website. Prospective visitors could also fill out a form of their basic information so they can be contacted. One thing the website could improve is the donation tab, it current does not allow people to donate online.

## **Information Management**

Most records are kept on paper such as hospital transportations, member information, volunteer information, and finances. The only full-employee Ann Bateman documents the information, labels them and stores them in folders in a cabinet. She is the only one in the organization that knows where all the records are being kept.

Very few information are stored electronically, including address books(names, emails, phone numbers, addresses) and volunteer services/hours. The volunteers submit volunteer hours and services via a Google online form. ([www.mtlebanonvillage.org/timelog](http://www.mtlebanonvillage.org/timelog)) A volunteer, who comes in the office periodically, downloads the Google spreadsheet as a CSV file, and uses Bento application to import the CSV file and keep the records locally.

## **Business Systems**

One board member, the treasure, manages accounting and most of the finance related tasks; All of the records are kept on paper. They are currently attempting to transfer these records on to Quickbook.

## II. Scope of Work

---

### **Task 1. Bento database is unable to create detailed reports**

I am planning to create a database system for Mt. Lebanon Village to manage member and activity information. Mt. Lebanon Village (MLV) currently only has a Bento database that tracks the volunteer activities by importing data from a Google form online. The Google form requires volunteers to complete after each volunteer activity. All the member information and board member activities are still kept on paper. The current system is too difficult to use according to my community partner. The Bento system requires users to convert the Google spreadsheet to a CSV file first, and then it can import the data from the CSV file. There are roughly 20 steps to take in order to import, archive, and backup the data. Lack of well-organized data is limiting the company's growth. For example, if they could create detailed reports of their activities, they would've received more funds because funders are really concerned about how the fund will be used. Also, a membership database would provide them information about what types of customers are more likely to join. For example, according to Ann, members are likely to join when their children attended the meeting with them. Currently, their current data collection method is ineffective because many volunteers do not fill out the form, [www.mtlebanonvillage.org/timelog](http://www.mtlebanonvillage.org/timelog). I do not know how many volunteers are not filling out the forms because they don't keep all the activities on paper either. It's safe to assume less than 50% of the volunteers are filling out the activities online. There is a possibility that the company is getting some PC computers donated to them from IBM. Even though the chance of the donation is not very likely, but it should be taken in to consideration. Bento is only supported by the Mac OS, and a multiple platform database is more suitable for the organization

### **Expected Outcomes**

The consultant is planning to implement an online form for the board member to fill out their activities as well as make major revisions to the current volunteer form. Currently some board members are using the volunteers' form when are working on administrative tasks in the office. Since these submissions are vastly different in nature, it is better to keep these records separately in order to generate accurate reports. The consultant will also create a database for them that are easy to use and maintain. The consultant's currently proposal for them is to switch to Microsoft Excel because it's a multiplatform flat file database that is easy to use. There is no need to convert files since Google spreadsheet can be downloaded as an Excel file. The consultant's recommendation is based on their current data volume and growth scale. They current only have approximately 30 members after a year of operation; Excel is more than sufficient to contain the data points. In addition, the consultant is currently developing an incentive plan for the volunteers to fill out the form.

- Create New Form
  - o Impact: They could collect board member activities
  - o Measurement: If there is a new form present and activities could be tracked
- Switch from Bento to Excel
  - o Impact: Multiplatform database that is easier to use than before
  - o Measurement: Need feedback about its usability from CP.
- Help CP to learn how to maintain and create a flat file database
  - o Impact: More organized data, moving away from paper kept information, more secure



- and easily backed up
- Measurement: Better data should result in detailed analysis reports.

## **Task 2. MLV board is undeceive about using ClubExpress' service**

Clubexpress.com (CE) is an online service provider specialize in website and database management. CE currently has a partnership with Village-to-Village network, and offering a 40% discount to its members. Village-to-Village network has been promoting CE and advising all village members to sign up for their service. MLV' s board was unable to come to a decision to sign up for CE' s service. They have come to ask the consultant to evaluate CE and its service. The consultant is responsible to provide a evaluation and recommendation for MLV' s board. The consultant needs to speak to the CE' s Village-to-Village network specialist, and learn as much as can about their service modules and pricing schemes.

### **Expected Outcomes**

The expected outcome is quite straightforward. After the consultant provides an evaluation report and his recommendations, the MLV board will meet and make a final decision about using CE's services. If they decide to move forward with CE, CE handles all their web server and database management. If not, they have to rely their current volunteers and interns to manage their website and the database which the student consultant set up for them.

### III. Outcomes and Recommendations

---

#### **Task 1. Improvement of information management**

The consultant signed MLV up for [www.clubexpress.com](http://www.clubexpress.com)'s (CE) service for web and database management. The transaction to CE has been completed, MLV is now able to manage their website online without web design knowledge because it has a pre-made template that only requires minor changes of text and images. MLV now has a membership database and able to generate reports such as web traffic, member demographics, member activities. CE also provides surveys modules and auto renewal membership services. They are sending notification letters in the mail, which is great for MLV, since many of its members do not use computers.

Databases are migrated from Bento to Excel, then eventually to CE's Microsoft's SQL server. The consultant was responsible for creating templates for the excel spreadsheets; migration of paper-based data to Excel sheets was done by the volunteers and staffs. Then the excel spreadsheet was converted in their relational database created for MLV. This would improve the data management greatly because their old method was only useful for maintaining the data on the local computer. Bento does not provide functions to generate useful reports. In addition to the activity logs, members data was entered into Excel and imported onto the CE database.

One outcome that is yet achieved is the activity log. The representative at CE claimed that they will be implementing the activity submission module in the second half of this year. This is a potential risk, however, CE has been recommended by many other “villages” that has been using their service and were very satisfied. Please see appendix II for their testimonials

As for top-level outcomes, I believe this change would improve the overall information management of the organization. They are stepping into a more automated and paperless operation. Only financial information will be kept from CE, rest of the day-to-day operation will be conducted via CE, email, and telephones.

#### **Task 2. Signing with ClubExpress**

The consultants have created a report for MLV comparing CE to other database application options. (Appendix A) based on his research as well as reading testimonials from other Village-to-Village members. (Appendix B). The MLV board has approved the switch to CE, and the sign up process has been completed. CE now provides many that functions that MLV is in dire need for at a low cost. (Following lists are absent at MLV, no comparisons can be drawn)

1. Membership database
2. Auto-renewal of memberships
3. Online surveys
4. Events sign up and notification
5. Online donation account
6. Long term web hosting
7. Automated report generation
8. Online documents sharing

Clubexpress required a lot of configuration, the website is [www.mlv.clubexpress.com](http://www.mlv.clubexpress.com). The web contents have been copied over from the original site with minor changes due to the different layout set up at CE. However, since these layouts are pre-made, no CSS/HTML are required, all configurations required were basic text and image positioning and manipulation.

The consultant handled most of the migration and configuration for MLV. CE also provides a 500 page manual for all of their services and configurations for the site. MLV has a high school volunteer Tyler who will also assist me in the process. Additionally, The consultant have hosted meetings with volunteers and other staffs, and give a tutorial of how to successfully input the data in the system.

## **Recommendation 1. Usage of Mac OS' Time Machine**

### **Source:**

MLV has two computers at their facilitate, and they are both recent models of iMacs with Snow Leopard OS. Currently, a lot of their files and contact information are stored on their local hard drive without any back-up methods. Time Machine is a great free, pre-install, easy to use, and semi-automated application that provides sufficient data back up support.

Time Machine let's the user automatically backs up your entire system in Mac OS X v10.5 and Mac OS X 10.6 or later. Time Machine keeps an up-to-date copy of everything on your Mac-- system files, digital photos, music, movies, TV shows, documents, and so forth. You can easily go "back in time" to restore files if you ever need to. Setting up Time Machine is as easy as connecting an external hard drive to your Mac via FireWire or USB, or by connecting to a Time Capsule. You can also use a secondary internal disk if your desktop Mac has one (that is, a disk that you don't start up from).

### **Process:**

User can manually select a backup disk in Time Machine System Preferences if the user wants to. “

1. Choose From the **Apple** menu, choose **System Preferences**.
2. From the **View** menu, choose **Time Machine**.
3. Click "Select Backup Disk".
4. Choose a disk where backups will be stored, then click “Use for Backup.”

**Note:** Every available disk that can be used to store backups is listed. If you've partitioned a disk, the available partitions are listed. Time Machine can't back up to an external disk that's connected to an AirPort Extreme, or to an iPod, iDisk, or a disk formatted for Microsoft Windows (NTFS or FAT format). If you select an NTFS or FAT-formatted disk, Time Machine prompts you to reformat the disk. Choose a different disk or reformat the disk in Mac OS Extended (Journaled) format. Because reformatting erases any files on the disk, only do this if you no longer need the files or if you have copies of them on a different disk.

If your backup disk is on a network, the network server must use Apple File Protocol (AFP) file sharing and both your computer and the networked backup disk should have Mac OS X 10.5.6 or later installed.

The most common format for a Time Machine backup disk is Mac OS Extended format, but Time Machine also supports Mac OS Extended (Case sensitive, Journaled) and XSan formats.”(Source: apple.com)

## Resources

There are many Time Machine tutorials online including the official apple web content. In addition, these sites can be used as helpful resources.

Time Machine Tutorials:

<http://www.macinstruct.com/node/234>

How to make the best of the time machine:

<http://arstechnica.com/apple/news/2008/04/how-to-make-the-best-of-time-machine-and-airport-backups.ars>

How to setup time machine:

<http://appleslut.com/blog/computers/how-to-setup-time-machine>

## Recommendation 2. Usage of Clubexpress' Administrator Manual

It is very important for the community partner, future staffs and volunteers to read the administrator manual in order to manage the website. It could be downloaded at [https://mlv.clubexpress.com/docs/ClubExpress\\_Administrator\\_Manual\\_v4.7.pdf](https://mlv.clubexpress.com/docs/ClubExpress_Administrator_Manual_v4.7.pdf)

This comprehensive guide provides explanation to Clubexpress' entire web functions as well the modules that the admin can activate. The CE site was created under the assumption that most of its users are not very tech savvy. Hence they virtualized most of the aspects of web management that would require knowledge of HTML, CSS, and other programming languages. The site is as easy to use as Microsoft Words. In order to sustain the level of technology and information management after the student consultant leaves, understanding of this manual as well as working collaboratively with the Clubexpress staffs is essential. Clubexpress has a Village-to-Village specialist, and he's easily reachable and very knowledgeable. By signing up for CE's service, MLV basically hired a long-term technical consultant that would use their best knowledge to provide MLV with a satisfying service.

## **Additional Recommendation Usage of Dropbox**

This is in the additional recommendation section because the consultants have already introduced MLV staff members to the Dropbox application. The consultant have signed up an account, and demonstrated how the application works. For the benefit of other readers, the dropbox application is a free online cloud-based file sharing program that allows you to transfer file safely and quickly to any other person with an internet access. Even though it's an software, one doesn't not need to install it to use it, one could simple log on to [www.dropbox.com](http://www.dropbox.com), and use the application directly from it's web. For further information, please check out the above mentioned website. It provides a video tutorial of how the application works.

---

## **About the Consultant**

Yiming Zhang is a junior majored information system, with an additional major in economics. He has previously worked for UBS as a database analyst for its summer internship. He also worked at ICBC as a corporate finance summer analyst the year before. In the upcoming summer, he's working as an investment-banking analyst for KBW. Recently, he was one of the creators of <http://cmuand.me>, a site that provides CMU students the opportunity to meet others on campus and exchange information.

Appendix A.

## **ClubExpress Report**

### **Introduction**

The purpose of this report is to analyze Clubexpress.com and alternative database software options.

Clubexpress.com: A company that provides web page and database management services for various clubs and organizations including 17 villages of the Village-to-Village network.

#### *Alternative Database Software:*

**Microsoft Access:** a great software package for organizational database management, however it does not support the Mac Operating Systems (OS X). Alternative Relational Database Management System (RDBMS) options for Mac include but not limited to Filemaker Pro, MySQL, and SQLite

**Filemaker Pro:** The same development company that created Bento created it. Bento is comparable to Microsoft Excel, and Filemaker Pro is comparable to Access. The report generating process is relatively easy and done completely through the view, a.k.a graphical user interface. However, while the package contains many powerful tools with great usability, most of the functions will not be used by MLV's current operation. The package cost approximately \$250.

**MySQL and SQLite:** Open source/free RDBMS that's widely used by people with a modest knowledge of database management, basic SQL, and C languages. Manipulation of data is needed in order to create reports.

## Clubexpress Details

I had a phone conversation with the Clubexpress's village specialist named Dan Mines at last week. His contact information is 203-297-5420 and danm@clubexpress.com I was able to gather more information about the organization. They would recreate the website with better graphical interface that provides more information for the members and prospective clients. In addition, they would track and generate report for MLV members using Microsoft SQL server. Since they have partnered with Village-to-Village network, they currently have a special pricing for the Villages. Instead of 40¢ per active member per month (\$4.80 per member per year.), they charge the villages 25¢ per active member per month (\$3 per member per year.) There is a fixed sum of \$150 as initial installation fee. They currently do not have a module for volunteer activity form online and associated database, however, according to Dan, they are implementing it in the second half of this year. He also claimed that they have never raised the price in years of operation.

## Comparison

	Clubexpress	Filemaker Pro	MySQL/SQLite
Cost	\$150 + 25¢ per member per month	~\$250	Free
Report generation	Done by Clubexpress	Report generation is implemented in the software. Relatively easy	Requires pulling the data from DB and run analysis on other software
Data Entry	Automated	Possible to import Google spreadsheet after data normalization	Requires store procedures to import data
Backup	Automated, backups are stored on clubexpress's servers	Automated or manually on local servers	Automated or manually on local servers

Customizability	Almost none since clients have no access to backend operations	Limited customizability but little is required to begin with	High customizability but it requires programming experiences
Data Visibility	Low, clients have no access to database server	All data are visible and manageable	All data are visible and manageable .
Website service	Improves website layout and contents	None	None
Security	High security	Based on user's setup. More vulnerable due to local storage of information	Based on user's setup. More vulnerable due to local storage of information

## Recommendation

I personally would recommend Clubexpress service now that I had a better understanding of them. They provide a basic technology management that's currently non-existent at MLV. They provide periodic update of the website as well as a database for the members. In addition, they currently offer a 60 day trail period which MLV can take advantage of. I believe it's worthwhile to give the free trail a try in the upcoming month.



## **Appendix B.**

*Posted by: Richard Elkin on 3/3/2011 at 10:54 AM*

*I would strongly recommend that you use Club Express.*

*Nauset Neighbors is using Club Express extensively and we are very happy with the product. This is a software package for membership organizations with special extensions added for villages. The extensions were designed with input from people with actual experience in running a village and it shows. We were able to tailor Club Express to meet all the needs of our organization. We are an all volunteer organization and needed to train about fifteen volunteers on how to use the package. People are able to pick it up.*

*Club Express provides excellent support via telephone so when we have difficulties or need to locate a feature, they are able to help.*

*We use Club Express to mainly to accept calls and schedule volunteers because that is what we are here to do.*

*We manage our membership and our volunteers. We have used the email capabilities to send mass emails to either all volunteers or all potential volunteers or volunteer staff. The mailing capability is quite flexible.*

*The package lets you collect fees online. It has an integration with QuickBooks. We don't use this since our fees are low and our finances resemble the proverbial shoestring. (No paid staff, no office, no office expenses, no phone bill).*

*The program lets you keep track of donations and send out tax letters at the end of the year.*

*Any software package you use will require tailoring and the development of procedures. Club Express makes that very easy.*

*We originally had another website, but have moved it to run under club express. We actually have three versions, one for the public, one for members and one for staff. The staff version gives access to capabilities that members and the public should not see. There is an extensive and fine grained control over who gets access to a given set of features. We let our membership committee control the data entry for members, and our call manager "office staff" control the dispatching of services.*

*In my opinion, this is clearly the best option for any village.  
Dick Elkin*

*Posted by: Sharon N Light on 3/2/2011 at 6:21 PM*

*Club Express is FAB-U-LOUS! We are so happy with it, and would recommend it to you*

highly. We are just getting ready to do Quickbooks Pro and will get it for non-profits on TechSoup.com at a reduced price. You can call our exec director to ask her about integrating all those things you want to do with her experiences with Club Express, and also the fact that Club Express is so very willing to work with us all to make this a tool that works for us like we want it to work for us. They listen and they are still working to create more and more in it for us.

Sharon Light  
Chevy Chase at Home in Maryland

Larry Evans  
417 Kurt Drive  
Pittsburgh, PA 15243  
c412-445-2951  
h412-341-1486  
f412-571-1647  
[leifevans@comcast.net](mailto:leifevans@comcast.net)