Mon Valley Initiative - Community Outreach Office

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I. The Consulting Situation

A. The Organization

The Mon Valley Initiative (MVI) was formed in December 1988 by 13 community development corporations from Allegheny, Westmoreland, and Washington counties to unite communities and restore the economic vitality of the Mon Valley. Currently, MVI has 12 community development corporations as members.

MVI was formed to fulfill the following three purposes:
1. *To provide a staff to be shared by its member community development corporations (CDCs) that would assist the all-volunteer boards of those organizations in identifying and implementing development strategies.*
2. *To raise funds to support development projects.*
3. *To join together for regional action and advocacy.*

The organization provides a social benefit and financial return by renovating existing housing stock, helping area residents to obtain job and career networking, and expanding opportunities for small businesses. MVI's programs can be divided into four categories:
1. Outreach coordinates special events such as the Spring Conference, the Golf Outing, and the Annual Dinner. The Spring Conference is where representatives from the 12 CDCs gather for strategic planning and education on economic development. The Golf Outing is a fund raiser for CDCs where participants are businesses and residents of the community. The Annual Dinner and meeting, where MVI reports on its year and elects officers for following year, also functions as a volunteer recognition award ceremony for participants from the 12 CDCs. In addition these special events, the Outreach is responsible for promoting both MVI and CDCs through publications and website. Lastly, the Outreach coordinates CDCs' board development.
2. Housing Development has been providing safe, affordable, attractive housing options for low-income families throughout the Mon Valley by renovating the existing houses and building new houses for over 10 years.
3. Workforce Development runs a career development program which offers career building workshops and meets with employers and potential employees in the area of Mon Valley. The Workforce team partners with other workforce agencies to help job seekers gain the skills they need for the workplace.
4. Initiative Fund helps small and startup businesses to gain the necessary funds to support their business' growth. The Initiative Fund also focuses on partnering with banks and other funding resources to gain access to funding needed for this program.

These four programs are headed by team leaders who report to the Chief Executive Officer (CEO), Laura Zinski who is responsible for budgeting, funding, and overseeing staff. The CEO reports to the MVI Board of Delegates, which is made up of 2 representatives from each of the 12 CDCs. MVI recently hired a Chief Operating Officer (COO) who will work with the CEO on various responsibilities. MVI currently has 20 staff members in which 2 staff members (Lorraine Conley and Eric Sloss) make up the Outreach.

Over the last year, the Outreach recruited 5 new CDC members and raised $11,000 at the Golf Outing for CDCs. Also, 300 people from the CDCs, MVI, and other organizations attended the Annual Dinner and Volunteer Awards program where MVI recognized 12 volunteers of the year and various other regional partners.

The 3-story building that MVI occupies is located in Homestead, PA at 303/305 Eighth Avenue next to the Waterfront. The first floor, which is a former retail space, is used by Workforce Development and Initiative Fund. Second floor is used by Community Outreach and Administration. The second floor has a copy room, offices, and network server. Currently, the third floor is used by Housing Development, but they plan to move to the first floor next door to Workforce Development very soon.

MVI's annual budget is about $1.2 million. Their funding comes from private foundations, individual contributions, and public funds related to their programs. MVI raises funds through funding applications from the foundations, banks and government, and a yearly campaign letter sent to prominent people in the Mon Valley and to volunteer members.

B. The Technology Situation
MVI has 20 Pentium 233 desktop computers and 2 Pentium III laptops. These 20 desktops are Pentium 233s w/ 32MB RAM running Windows 98 on AT machines. Workforce uses one laptop and one laptop is used by the Initiative Fund. One computer has 128MB RAM, scanner, digital camera, ZIP, and RIP box (for printing).

Each of the desktops has Microsoft Office programs such as Word, Excel, Access, and Outlook. Each staff member uses the computer to send e-mail, write grant letters, make budgets for construction projects, and create reports to funding agencies by using these Microsoft programs. In addition to these software applications, MVI has purchased some other software such as RBase, Quattro Pro, and Lotus Notes.

All the computers are networked via a 10/100bT network cards and connected to the Internet via two USR 56k modems connected to a web ramp. The web ramp is used to share the internet connection among the users of the network. The web ramp is then connected to two 5-port hubs. There is a central server which is backed up daily that serves as a POP3 gateway. The server is running Windows NT4. MVI has a website, which helps to promote MVI. Their web site address is www.monvalleyinitiative.com.

There are 5 laser printers that are located in various areas so that certain areas of the office can use the printer closest to them. There are 2 printers each on second and third floor, and the first floor has 1 printer.

Until recently, MVI relied on external consultants and volunteers to support both users and the technology. The leadership now understands the need to give direction for how technology is used. Given that they are now in a more sophisticated and complicated technical environment, Mr. Sloss, who is the public relations coordinator, has taken on the role of Technology Officer. In this capacity, he will try to troubleshoot everyday computer problems, which helps to build capacity in the organization to become more technically self sufficient. If Mr. Sloss can't fix the problem, he calls Shiloh Services, which is extremely costly, where the organization has purchased the computers and peripherals, to get help. For instance, when there was a virus that infected one of the computers, personnel from Shiloh Services came to fix the problem. As far as technology management goes, MVI wants to maintain their current technology, and to improve their technology as it is necessary.

C. Consulting Partnership's Focus

The community partner (CP), Lorraine Conley, is the Community Outreach Director who is responsible for CDC board development, recruiting of new members through various programs and direct contact with community members. She organizes special events like the Spring Conference, the Golf Outing, and the Annual Dinner for fundraising, strategic planning, and volunteers' recognition. The Community Outreach's mission is *to enhance the public image of Mon Valley Initiative and its member community development corporations through public relations programs, special events and volunteer recruitment.*

Ms. Conley uses technology in many ways.
- She develops outreach financial reports related to special events by using Microsoft Word.
- She uses Word to type the monthly report that she uses to report to the CEO.
- She uses Microsoft Excel to make a registration file to keep track of who is coming to special events.
- She uses Outlook several times a day to e-mail MVI staff members about upcoming events and news, and she gets e-mail from board secretaries about board meetings of some CDCs.

Ms. Conley uses her contact lists often to contact CDC members and volunteers, which is one of the Outreach's missions. If they become outdated, she might not be able to contact important people, which would be a significant problem. Also, since there are about 130 CDC members, it is very difficult for her to keep track of all of them. Moreover, when she needs labels for letters, she needs to ask the Executive Assistant to print them out for her. This task involves more time for Ms. Conley and the Executive Assistant.

Ms. Conley stored and maintained data in many different ways.
- The Executive Assistant maintained the corporate database called MVIMain database, which consists of contacts used by Outreach and other MVI staff. This database was not on the server and can only be updated by the Executive Assistant.
- Ms. Conley maintained her own contact lists, which were stored in multiple formats including Word and Outlook formats, which meant redundant information.
- Information was often incorrect because the MVIMain database and her contact lists were not updated when information changed.
- Information changes came from a variety of sources throughout the organization and sometimes never made its way to the Outreach.
- Information about special events was kept in Excel, which made it hard for her to pull out information as it was necessary.

The most important aspect of the problem was that she did not fully understand the capability of the database. In order for her to continue to expand her capacity, she needed to understand the potential of the database, which will serve as motivation for her to keep on learning and using the database, by searching for resources that might help her to increase knowledge of technology.

In order to solve the problems stated above, the scope of work for this consulting project was for both the student consultant and Ms. Conley
1. To organize and update the MVIMain database by learning more about Microsoft Access from the Executive Assistant, who has previously used Microsoft Access and was familiar with the MVIMain database. This took a lot of time out of learning new software, but this will save time in long run for Ms. Conley.
2. To build a personal database called Special Events that she will use for organizing the special events. Since she needed to have contact lists of CDC members often, she could use the MVIMain database to get information about CDC members without going through her own

contact lists. Also, her Special Events database will help her organize special events such as the Spring Conference, the Golf Outing, and the Annual Dinner.

The benefits for Ms. Conley from creating the Special Events database that incorporates information from the MVIMain database include that Ms. Conley:

- Can find information quickly when it is necessary.
- Has clear understanding on Microsoft Access.
- Will be able to recognize the importance of organizing information using Microsoft Access.
- Can reduce the time producing duplicate of the lists or documents whenever she needs to merge them.
- Can train other staff in creating a personal database.
- Encourages other staff to use Microsoft Access in organizing information.

With these benefits, Ms. Conley will be able to organize important information for later use. She can increase her productivity by using this Special Events database, which means more time for other important tasks such as contacting CDC members. With Ms. Conley's clear understanding of the MVIMain database, Ms. Conley will encourage other staff members to use the MVIMain database, which can help them to complete their responsibilities more efficiently.

As for the Outreach, the Special Events database and MVIMain database will give the Outreach organized information, which will lead to more time that the Outreach can spend on other programs that will enhance the public image of MVI. As an organization, MVI will be able to see the big picture of each program and have an idea of how many people are enrolled and whom they need to contact for a certain problem. In addition, with the MVIMain database in place, MVI could use more of their time in expanding on their programs and searching for more funding to achieve its mission. Finally, MVI will be able to use current technology effectively without a cost, and MVI will be able to recognize the powerfulness of technology in order for them to continue their technology learning and usage.

II. Outcomes and Recommendations

A. Consulting Outcomes

1. Organize and Update the MVIMain Database
a. Outcomes
- MVIMain database was well organized and updated with the latest information, which will benefit them in the long run. This outcome can be sustained in that it is very easy to delete duplicate copies and update new information since Ms. Conley and Executive Assistant have fixed a report by deleting duplicates in the tables of the MVIMain database.
- With organized and updated database on the server, everyone has access to it, which means that everyone can use it to get the information they need without asking the Executive Assistant.
- Time in producing accurate labels for mailing was shortened because duplicates in the tables were eliminated.
- Ms. Conley imported information in the MVIMain database into the Microsoft Word for mail merge.
- The relationships in the queries were fixed, which saved time and paper because Ms. Conley didn't have to look for wrong information on the printed labels.

- Ms. Conley understands why database is important and useful, which will motivate her to gain knowledge about the MVIMain database.
- Ms. Conley taught the Executive Assistant on how to delete duplicates in the tables.
- The Executive Assistant and Ms. Conley worked as a team in updating the MVIMain database.

b. Recommendations

Recommendation 1: To Ensure Data Integrity
- MVI needs to discuss about the procedure that needs to be set up for updating the MVIMain database, such as deciding who is going to be charge of actually updating information in the MVIMain database and how to report the information changes. I recommend that the Executive Assistant should be in charge of updating since she has been maintaining the MVIMain database.
- If these procedures are implemented, then the MVIMain database will be current and accurate, which means no duplication and errors in deleting records. Also, MVI staff members will save time by not making duplicate copies of the important information. By saving time, the staff members can use their time in other important tasks at hand. In addition, all staff members will know what to do when they receive updated information.
- It is critical to MVI that all of the staff members participate in updating the MVIMain database because the Technology Literacy Benchmarks for Nonprofit Organizations, which is a tool designed to help nonprofit organizations grapple with the challenges posed by computer technology, recommends that staff members use a database to keep track of individuals and groups of individuals associated with the organization.

   Resource: http://www.techsoup.org
   Techsoup.org provides technology help for non-profit organizations. In order to find the page related to the database, click on the Find Tools and Resources button, which is located on the right hand side of the webpage. Then, click on the Databases button which is located on the left hand side menu. Then, go through this website to find important information. It will be very helpful to take the Database Assessment Worksheet to assess the current use of the MVIMain database. This website is useful in that it is comprehensive and easy to follow. The person who will be in charge of maintaining the MVIMain database will need to go through the website to figure out what needs to be done to utilize the MVIMain database to the fullest extent possible.

Recommendation 2: Hire a student consultant
- MVI should consider hiring a student consultant to utilize the MVIMain database to the fullest extent possible. The MVIMain database is currently used only for storing contact information. MVI should integrate other programs' information system into the MVIMain database. For instance, Jefferson Brooks, the director of Workforce Development, stores information about the job-seekers using paper instead of using the computer. It will only help the Workforce Development to learn how to store information about job-seekers using a database.
- MVI can hire a Carnegie Mellon University student with work-study so that only 25% of the students pay would need to be paid by MVI. I recommend that MVI hire a student consultant instead of professional consultant because this will save money for the organization. Also, at University of Pittsburgh, the graduate students are required to do 100 hours of internship work throughout the year. Non-profit organizations are welcome to use this to their advantage.

- By hiring a student consultant, Ms. Conley can learn and ask about aspects of the database that fits her and MVI's needs.

    Resources: MVI can contact the CMU Career Center at (412) 268-2064 or the UPITT Director of Career Planning, Dorothy Sweeney at (412) 648-7639.

2. Create personal database for special event management
   a. Outcomes
- Ms. Conley created a personal database that she uses for special events called Special Events database. By using the Special Events database regularly, she will gain more and more knowledge about the database, which means that the Special Events database will be sustainable.
- Ms. Conley created tables, queries, forms, and reports to store the information about the Spring Conference, which is one of the three major events for MVI including the Annual Dinner and the Golf Outing, in the Special Event database.
- Ms. Conley started and is continuing to create tables for the surveys that she received from the CDC members.
- Ms. Conley has gained knowledge on basic skills and functions of Microsoft Access.
- Ms. Conley used the Special Events database as a primary source for storing information in the computer, whereas before, she stored information about the special events in many different formats including Excel and Word.

   b. Recommendations
   Recommendation 1: Take a course in Microsoft Access
- Ms. Conley needs to decide on what college and course that she can take because she has many other responsibilities.
- By taking a course, Ms. Conley will develop database planning, analysis and design skills, and strategies for applying those skills, which will help her to better understand and use the MVIMain database.
- While learning about the database through a course, Ms. Conley needs to practice her skills through using what she learned from the course to make changes in the Special Events database in order to increase her capacity.

    Resources:
- http://www.ccac.edu
  The website for the Community College of Allegheny County is very easy to find information on. To find the courses, click on the Prospective Students button on the left side of the website. Then, click on the Class Schedule, Forms, and Catalog button. For example, there is a course at Community College of Allegheny County called Database Management: Access, which is offered on June 1, 2002 at the South Campus from 9:00am to 5:00pm. The course number is CIT 606, and the course requires Windows experience and previous use of application software.
- In addition to the course, contact Mon Valley Providers Council to see if they offer a course in Microsoft Access because it will be free since MVI is a member of Mon Valley Providers Council. Their web address is http://www.hscc-mvpc.org/index.html. Ms. Conley can e-mail the contact person, dcoplan@hscc-mvpc.org, to find out about course offering.

Recommendation 2: Search the Internet for tutorials

- Ms. Conley should take some time out of her work to search the Internet for Microsoft Access tutorials because this time spent on searching will enable her to use her time more efficiently in the future. Once she finds a good website, the website should have links that she can go to find other excellent tutorials.
- Since MVI now has DSL, Ms. Conley should not have any problems in searching Microsoft Access tutorials on the Internet.
- Ms. Conley has gained some basic skills and terminologies in Microsoft Access, but she needs to keep on searching to gain new knowledge about Access to continue to expand her capacity. Therefore, she should utilize the Internet, where unlimited amount of information about Microsoft Access and database in general exist.

Resources:
- http://www.google.com
- To find Microsoft Access tutorial websites, type "Microsoft Access Tutorial" in the search box. Here are some useful websites that were found from searching:
- http://www.functionx.com/access/
- http://cisnet.baruch.cuny.edu/holowczak/classes/2200/access/accessall.html

B. Other Recommendations

Recommendation 1: Create e-mail accounts for CDC members

- Some of the CDC members do not have computers, so they do not have access to e-mail. Since Ms. Conley's job is to coordinate CDC board development for all 12 CDCs, it is critical for her that she contacts the CDC members whenever she wants to. The Technology Literacy Benchmarks for Nonprofit Organizations recommends that all staff members should have e-mail accounts. An improved communication network between the CDCs and MVI could be setup through the new computer lab for the Workforce Development team by creating e-mail accounts for CDC members and helping them to find local libraries that have computers, so that they can check their e-mail closer to their homes.
- The CDC members will have e-mail addresses that they can be reached at any time. Also, it is easier, faster, and cheaper for Ms. Conley to send out important information such as special events through an e-mail system than through letters. As for the CDC members, they will be more informed on what is going on in the community and in MVI. Also, for some of the CDC members, this will be a first step in learning about technology.
- Ms. Conley should discuss about the importance of having e-mail accounts for the CDC members at the monthly meeting so that everybody can help to achieve this goal. Then, she should contact Jefferson Brooks, the director of Workforce Development, to ask if the CDC members could be trained on using e-mail accounts at the new cluster that was created. Also, Ms. Conley should contact the CDC members that MVI will provide training for utilizing e-mail accounts. One of the best places for her to discuss about this recommendation is the Spring Conference because most of the CDC members and MVI staff members will be gathered.

Resources:
- As for the e-mail accounts, here are recommended websites that provide free e-mail accounts.
- http://www.yahoo.com
- http://www.hotmail.com
- For yahoo.com, there is a link under the Search button, which says Mail. After clicking on this link, click on the Sign up now link, which is located left top portion of the website. For hotmail.com, click on Sign Up link which is located top portion of the website. Only general information about the CDC member is required such as name and address, so it will be easy to sign them up.

Here is a website that will help to find the libraries for the CDC members.
- www.yahoo.com
First click on the US States under the Regional category, which is located middle of the webpage. Next, click on Pennsylvania. Then, click on Pittsburgh. After that, click Community, which is one of the choices for the drop down menu under Local Web Sites, and then press go. Then, click on Libraries. Libraries will have Internet connection so that the CDC members will be able to check their e-mail.

About the Consultant:
Mark Seo is a junior at the Carnegie Mellon University majoring in Business Administration and Computer Science. I hope to work as a consultant at a respectable firm after graduating from CMU