

**National Alliance for the
Mentally Ill-
Washtenaw County
(NAMIWC)**

Administrative Process Analysts:

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Executive Summary

Background:

In September of 2006, the National Alliance for the Mentally Ill – Washtenaw County (NAMIWC), asked the School of Information at the University of Michigan (SI) to help them analyze information processes used in their office. From September through December, the Administrative Process Analysts (APA), a group of students from SI, interviewed several people from NAMIWC, defined current processes used in the NAMIWC office, identified problems, and developed recommendations to help the office run more efficiently.

Findings:

First, APA believes that it is important to mention there are several things that NAMIWC does well. NAMIWC does an excellent job of including people, allowing them to share their stories and their problems, and providing a supportive environment for people struggling with mental illness. Also, the staff of NAMIWC recognizes the importance of reminders or triggers to organize their workflow and ensure that things get done as efficiently as possible. Nonetheless, there are areas that can be improved upon, and we have identified three particular problematic areas.

1. The current processing of membership data is extremely complex
2. Members are not defined because of inefficient use of current database
3. Office manager is the only person who interacts with the membership database

APA Recommends the following to manage these areas.

Short Term Solutions:

- The office manager should make a chart of expiration dates for membership
- The office manager can better utilize the current database by printing reports of the membership data
- The office manager can eliminate the pre-sorting of membership forms into alphabetical order before entering the information in the database.
- NAMIWC should try to make use of the current membership classifications
- NAMIWC should receive training on QuickBooks and FileMakerPro 7
- The office manager should set aside time when the office is closed to focus on important administrative tasks
- The Office Manager should designate some of her current tasks to the volunteers

Long Term Solutions:

- Membership expirations should be automated in database
- The office manager should consolidate the steps of the membership data processing
- A new database should integrate bank account, contact, and membership information

- NAMIWC should develop more representative classification for membership
- A new database should be designed with a single interface or Graphical User Interface (GUI)
- NAMIWC staff should receive training on a new database from system designer
- NAMIWC should network their computers
- NAMIWC should create a simple, yet comprehensive training manual
- Volunteers should work on most of the membership database tasks

Conclusions:

From our understanding of NAMIWC, there are two essential goals the organization wishes to accomplish.

1. The office manager should spend approximately 80% of her time on outreach and support to potential members and 20% on administration
2. NAMIWC should empower volunteers by giving them skills within a supportive environment that they can transfer elsewhere

By putting the short term solutions into force as soon as possible APA believes that the office manager will see a reduction in the time spent on administration. Also, by using the long term solutions as a guideline for future information architects who will design a new database and help to write a new procedure manual for NAMIWC, members of the staff can begin to put in place an infrastructure that will help to reach these goals.

The members of APA would like to thank NAMIWC for their time and for allowing us to pursue what has been a great project. We hope that the following report helps them in their future endeavors.

Background

Overview of the Organization

The National Alliance for the Mentally Ill-Washtenaw County (NAMIWC) is a non-profit organization that offers support, education, and advocacy for people living in Washtenaw County dealing with issues of mental illness. Examples of their work include fighting the stigma of mental illness, teaching NAMIWC members and the community about mental illness topics, and empowering people suffering from mental illnesses to lead fulfilling lives.

NAMIWC supports their goals by offering several services such as support groups for family and friends of people with mental illness, support groups for individuals with mental illness, and monthly program meetings in which NAMIWC engages the community with public education and outreach activities (for instance bringing in speakers to talk about mental illness issues). Additionally, NAMIWC offers an 11-week FEST program (Family Education, Support and Training) that teaches family members how to support loved ones who suffer from mental illness, and Family Day, an all-day event with speakers and workshops held once a year that are designed to educate the community about mental illness issues.

The planning and implementation for all of these services is an active part of the NAMIWC office which has one paid position as a part-time office manager. The office manager takes care of public education and outreach activities, and provides information and support year-around to community members who call the office by listening to the person's concerns, providing information to that person, and by directing the person to other organizations that can provide more support or services.

Statement of Need

In addition to these other tasks, the office manager is also in charge of managing the day-to-day finances of the organization and keeping track of the organization's membership. These two tasks are crucial to the running of NAMIWC. They are also the tasks that take up most of her office time (U01 Interview Lines 1-5, Appendix C, D, E, I).

Both of these tasks are managed by using separate software programs. Our group was asked to investigate these two tasks, and to see how the office manager could streamline this work. By understanding the goals of the office work for the organization, we hope to streamline and simplify the administrative tasks. Eventually, the organization hopes to follow some of our recommendations and create manuals that would train volunteers to do the office work. That way the office manager would have more time to provide services that enhance the goals of the organization, and less time on administration.

By limiting the scope to only the tasks surrounding the membership database, our group ensured that our recommendations will have the most impact on the organization, since the membership database controls a large part of the office manager's time and attention.

The Effects for the Major Stakeholders

The major stakeholders affected by our recommendations are the office manager, the volunteers, and the board of directors. Clearly, the office manager will be the most affected by the change in her daily work routine. She has welcomed any suggestions that will allow her to complete office tasks more efficiently, and looks forward to developing the organization's services to better serve the community.

The volunteers will also find their roles changed because they will be engaged more in the process of running the organization. Since one of the goals of the organization is to empower their members to lead fulfilling lives, engaging in administrative work in a supportive setting like the NAMIWC office affords them the opportunity to increase their social skills and become comfortable in a social, working environment. In addition to social skills, the volunteers will also be introduced to new technical skills that will allow them to be more comfortable in positions where they need to operate office equipment.

The organization as a whole would benefit by being more accessible to more volunteers with a wider range of abilities. Furthermore, the organization would be less hindered by unpredictable volunteer hours, because streamlining these tasks would make it easier to learn them without the office manager overseeing the work for every new volunteer.

Finally, the board of directors will have a better grasp of the nature of the office work, and will be able to maximize the newly-freed time of the office manager to better implement the goals of the organization. Currently, the office work is appreciated by the board of directors, because it is a necessary function for keeping the NAMIWC chapter running. By better understanding the administrative tasks outlined in this report, the board will be able to make better decisions about the level of support volunteers are able to provide, and the time the office manager needs to spend on office work and services.

Data Collection

Interviews

We interviewed a total of 5 people associated with the organization over a 1-month period. Our interviews lasted between 1-2 hours. Two team members conducted the interview, one acting as interviewer and the other serving as note taker. We completed follow-up interviews with key staff to observe work tasks and answer questions developed after the interview. The 3 follow up interviews lasted 3 hours each. We interviewed people from all major job roles including key office staff, volunteers, and the board of directors (Appendix A).

During the interviews, key staff members showed us how they performed tasks including entering new members into the database, handling free newsletters and membership expirations within the database, handling checks, answering phone and emails, migrating financial data from Quicken to Quickbooks, and processing procedures for thank you letters. We also observed interactions between staff members and volunteers. We focused our interview questions on the way daily tasks of the organization are currently completed. Questions asked of staff members

included a description of job responsibilities, the way the membership database works, the assignment of work tasks, existing triggers for those tasks, communication between members of the organization, the way staff handle phone calls (and the number of phone calls they receive), the organization of volunteers within the association, the use of the paper filing system, the type of computers and software in the office, and the ongoing creation of an office procedure manual. We also collected materials from the organization such as newsletters, membership forms, pictures of the logbook, and photos of the office.

Data Analysis

Interpretation Sessions

After the completion of each interview, the group met to discuss the information gathered during the interview. The primary interviewer led the discussion, with the note taker offering observations as needed. During the interpretation session, other team members raised questions and asked the interview team to clarify points. We created interview notes that included especially important ideas and points emphasized by the interviewer. These notes included interpretation of events, important characteristics of the work, breakdowns in the work, cultural influences, design ideas, and questions for future and follow-up interviews.

Creation of Sequence Models

During the interpretation session the group also created sequence models capturing the administrative tasks in the office. An important need of NAMIWC was to define the exact steps the Office manager and volunteers to manage the membership database. Therefore, we paid particular attention to this process and created models capturing the migration of financial data to Quickbooks, the filing of membership checks, updating the membership database, requests by non-members for free newsletters, answering the phone, creation and sending of thank you notes, and creation and sending of reminder letters for membership expirations. These sequence models helped us understand the flow and sequence of administrative tasks in the office. The models also identified the major breakdowns and redundancies in the office, as well as the procedures that currently work well. All of these sequences are included in the Appendix.

Other Models

The group also created other models to help understand the data collected. These models included an artifact model, a cultural assessment model, and a consolidated sequence model.

Artifact Model

We examined the membership database form and the logbook. These two artifacts are used primarily to capture information from membership forms (a form containing basic contact information like name, address, phone number, and e-mail) into more standard formats that office staff and the volunteers of NAMIWC can access. Additionally, the logbook and database are used to integrate financial information such as the size of donations, membership expiration, and receipt of NAMIWC newsletters. The staff also uses this information to migrate into a new

financial system, QuickBooks. The staff takes the information from the membership form and puts it into both the logbook and a membership database. There is very little interaction between the logbook and database. Primarily, the office maintains two forms to facilitate entry of data into the state and national databases more easily, but has noted that there are problems with this (U01 Follow-Up Interview Lines 5-9). This model demonstrates how the staff has chosen to represent their membership information up to now. Additionally, the model shows the inefficiency of transferring from one format to the other, and it gives an indication of possible ways to consolidate the two forms into one. (Appendix K)

Cultural Assessment Model

This model identified key characteristics of organizational culture at NAMI; it is important because of the potential constraints on design issues, particularly, the need of the organization to balance their goals of streamlining and reducing inefficiency in the office with the need to be inclusive of all members of the association. One of the most helpful analyses was a discussion of the coding system in the database. The data from our interviews and observations revealed an internal issue of concern about coding members as customers in the membership database or in grant proposals. For example, during a discussion of how to apply for a grant, members expressed concern over being considered a customer of the organization rather than a contributing member of the organization (U05 Interview Lines 15, 21). As an organization, they are struggling with this issue, as at least some members do not want to be considered customers while others see that as a route to increased grant funding by showing how many people the organization helps each year. (Appendix N)

Consolidated Sequence Model

We consolidated the sequence models about the membership database to give us a better idea of which steps were redundant or unnecessary. The model allowed us to view the big picture of all the steps currently involved in processing membership at NAMI. The model helped us build a coherent view of the work practice at NAMI, to identify triggers, activities, intents, abstract steps, and breakdowns of the tasks involving the membership database. Breakdowns were clearly identified in the consolidated sequence model, allowing us to look for common problems across the many steps of membership processing. Identifying the intents of the activities allowed us to better see what needs to be done compared to what is actually accomplished. This model allows us to see how various steps often fit in (or in some cases do not fit in) with the overall goal of streamlining membership activities in the organization. (Appendix J)

Affinity Diagram

The affinity diagram is simply a way of viewing the data differently to better understand the major themes. The goal is to view in one place common themes across all of the data collected, and to better understand the scope of the problems facing NAMI. We took our notes from the interpretation sessions and printed them out. We then arranged them on a blank wall in groups based on a common theme or nuanced idea. After arranging them in like groups, we gave each group of 5-6 notes a heading. For example, several notes suggested the ability of staff members to use triggers to get work done. We gave this group of notes the heading “I create triggers to get

my work done.” After each group had a heading, we looked for larger themes and then created larger headings for each group of data until we identified 5 major themes relevant to the project. These included balancing culture and efficiency, utilizing human resources, integration of membership and financial data, public outreach, and time and space management. We then took two hours to “walk the wall” and discover how the common themes linked together. As we read what we wrote, we developed design ideas and added them to the diagram. Thus, the affinity diagram creation helped us better comprehend the large amount of data we collected and led to the core of our recommendations and design ideas. (Appendix L)

Organizational Strengths of NAMIWC

Aware of organizational culture and goals

NAMIWC has a strong awareness that there is a need to balance the culture of their organization with their goals of efficiency. People will always come first, and the organization is aware of this commitment. They have a good sense of how they would like to help people and are dedicated to this work. Thus, as much as they want to streamline their administrative processes, they do not want to sacrifice the emphasis on people in order to increase efficiency (U03 Line 30, 38, 39). While a key member of the organization would like “to see less redundancy in tasks” (U03 Interview Line 20-21), at the same time he wants to increase aid to more people (U03 Interview Line 64).

Observation of the board meeting revealed the inclusive nature of the organization. Everyone was allowed to talk and express their views, even members who are not on the board and probably would not have been allowed into such a meeting at other organizations (U05 interview Line 5, Line 20, Line 27). There is a high premium on listening to what people have to say, and listening to their stories. Listening to people, whether at a board meeting or in the office, is a key part of what the organization provides to the community. Because of this, answering the phone to talk to someone has a higher priority than finishing an administrative task (U01 interview Line 35-36). NAMI is aware of this and wants to make changes to the system that fits their culture.

Overall, NAMI recognizes their limitations and is seeking to improve their administrative system to provide better service for their members and other people in the community.

Use of triggers in NAMIWC

The staff of NAMIWC does an excellent job of using triggers around the office to get tasks done. They have created a system for organizing work with limited resources. Thus when looking at our recommendations, we are looking for ways to increase the triggers around the office.

One key staff member lays out all of the work that needs to get done that day on a desk to help organize and prioritize the work (U01 Follow-Up Interview Line 77-78). This procedure helps visualize the work and plan out a schedule for getting it done. This tactic also makes good use of limited space.

Another good use of a trigger by staff is the depositing of checks every two weeks (U01 Interview Line 70). With this important task scheduled, it is assured that that financial operations continue smoothly. When tasks are scheduled at specific times, the work gets done efficiently and with more accuracy.

Findings and Recommendations

Finding One

Our first finding re-states what NAMIWC already knows: that maintaining and processing membership data using the current database is a complex task (U03 Interview, Line 22). These difficulties are exacerbated by the fact that there is no in-house technical support that could aid the organization in using their current software to its full potential, or to help train the staff to use new software. From our interviews, we were able to outline all the tasks surrounding the membership database information into sequence models (Appendix C, D, E, I). These models outline various inefficiencies and redundancies that impact the office manager's ability to work quickly with the database to either enter data or use the data to complete other tasks.

Finding One: Examples from Interviews

For example, during our first interview with the office manager, she showed how she enters expiration dates for membership in the database. She must manually calculate the expiration date in her head, and then enters the date in the "comments" field of the database (U01 Interview, Line 53). Clearly, interruptions during this period of her work are detrimental to the work being done quickly and correctly.

Additionally, there is no way for the office manager to sort the membership by the date of expiration. Instead, to know whose membership has expired, the office manager must manually check the expiration dates listed in the comment field (U04 Interview, Line 33). Again, any interruptions during this task can lead to mistakes. In this case, if there are people whose memberships have expired and they still receive newsletters, NAMIWC is losing money.

There are also redundancies during the processing of membership data. The office manager currently enters membership data into both the database and a paper log-book (U01 Interview, Line 43). The office manager maintains NAMIWC's database information for the newsletters and other mailings, but uses the paper log to help her enter information into the NAMI national database (U01 Interview, Line 42). The office manager also enters membership check information into the database and makes a physical copy of the check for the files (U04 Interview, Line 48). In both cases, the elimination of the redundancies will assure that more of the office manager's time and attention can be spent on outreach.

A related redundancy is alphabetizing the membership forms before entering the membership data in the database (U01 Interview, Line 42). Once the membership information is entered in the database, the data can be sorted alphabetically, or by any other criteria the office manager

sets. This step is a built in redundancy handed down over time, before database design was as efficient, and can be eliminated (U01 Interview, Line 43).

Finding One: Short-term Recommendations

There are several recommendations we can make to simplify the processing of membership data. These can use the current database and can be put into effect in little time. First, the office manager should make a chart of expiration dates. If the office manager can fix one day each month (or once bi-weekly) when memberships will expire, then she can create a chart of these dates, and place it next to her computer, either on the wall or on the edge of the monitor. By using a chart of expiration dates, the office manager will not need to manually calculate the date in her head, and the chart will trigger the office manager to check the database for expired memberships. Furthermore, it will aid any volunteer who is willing to do the task, but does not know the expiration dates as well as the office manager.

The office manager can also better utilize the current database by printing reports of the membership data. The office manager can use the database to print a report of recently added or recently expired memberships. This would eliminate the redundancy of entering information into both the database and the paper log. The office manager could use the printed report in place of the paper log for updating the national database. Finally, the office manager can eliminate the pre-sorting of membership forms into alphabetical order before entering the information in the database.

Finding One: Long-term Recommendations

The other recommendations we developed concerning the membership database will take more planning and time. These are possible recommendations for a database architect to take into account when creating a new database. With some training, there may also be a method of using these ideas in the current database as well.

One of the ideas that may be feasible with the current database, but should definitely be part of the future database, is the automation of membership expirations. Currently, the office manager manually checks through the database and finds expired members. Once the memberships have expired, the office manager erases the postal code attached to the membership record. To automate this process, the database should be set up to automatically register expired memberships, so the office manager would not have to manually delete information to indicate the membership has expired.

Second, the office manager should consolidate the steps of the membership data processing. There are five parts to this membership database that need to be included in order to maximize the efficiency of the database specifically for NAMIWC. First are the paper forms that are turned in. Second is the paper log-book the office manager uses to record membership information to enter in the national database. Third is the Filemaker (membership) database. Fourth is the Quicken/QuickBooks database for financial information. Fifth is the national NAMI database. An information architect will need to develop a database that can integrate all

of these features, so that perhaps U01 or a volunteer can simply enter all of the data once and things automatically can upload into other formats later.

Third, the new database should integrate bank account information into the new membership database. Most banks offer online banking options. The database should be able to connect with the bank over the internet, so the office manager is able to track changes to the account more easily, and in a familiar format. The office manager would also be able to access the electronic copies of their own cancelled checks and the checks from members of their dues, so the office manager would no longer need to keep paper copies of the checks.

Essentially, the goal is for the office manager to only deal with one database, rather than having separate databases for finances and membership. By only having one database, the office manager will save time by only having to learn how to run the one software program. The office manager will also save time, by not having to switch between two databases, which will also minimize errors.

Finding Two

Finding Two: Members are not defined because of inefficient use of current database

Another of the major findings we discovered during our data analysis was that NAMIWC was not completely aware of its current members. After our visioning session, it came to our attention that their inefficient use of the database is the foundation of the problem. However, there are two underlying causes to this problem. First, the current membership classifications levels are unclear. Second, technology posed a problem for the NAMI workers and volunteers.

Finding Two: Examples from Interview/Observations

One of the major observations made during the interview/observation process was that the membership database currently contains seventeen hundred people, while there are only two hundred and fifty paying members (U01 Interview, Line 71). We believe that some of these may be duplicate records; however this shows that NAMIWC has people in the database who were previously involved and might still have interest in volunteering, donating, or becoming further involved with NAMIWC.

This links to another observation. NAMIWC does not use its current membership level features within the database for member classification because the current classifications are not representative of the different types of people with whom NAMIWC interacts (U01 Interview, Line 25). For example, some of these classifications include family member or student, and do not signify the level of participation in NAMIWC of the individual. NAMIWC offers different levels of membership including one based on financial need. They need a way to capture information about volunteers, paying members in the past, and those now involved in NAMIWC in other ways. The office manager does not currently capture these different levels and types of membership in the record because the classifications available in the database do not fit the actual types of membership. These classifications were inherited from the previous office manager who helped design the database (U01 Interview, Line 65).

During our interview observation sessions we also noticed that technology posed a challenge that affected the way the current database is being used. We recognize that this is because NAMIWC has not received any training on the current technology being used and that this affects their efficiency and accuracy in terms of getting work accomplished. Again, without in-house technical support, it falls on the organization to master the system without aid. This was evident when the CFO and office manager were transferring information from Quicken to QuickBooks (U02 Interview, Line 11). The CFO spent about fifteen to twenty minutes of the total hour trying to figure out a classification, commenting that “there has to be an easier way to do this”. (U02 Interview, Line 73) Furthermore, based on our observations we believe that the office manager may not fully utilize the database functions and features (U01 Interview, Line 25).

NAMIWC is aware that they do not know exactly who their members are. Observations at the Board Meeting demonstrated this. They discussed how to connect with more members of the community who are sympathetic to their cause and have donated in the past (U05 Interview, Line 4, 19). They are also aware of the potential uses of the classification system in helping them to identify their members (U05 Interview, Line 15). However, they did not seem aware of how improving their interaction with the membership database could help them solve this problem (U05 Interview, Line 5).

Finding Two: Short-term recommendations

In the short-term we believe that NAMIWC should try to make use of the current membership classifications. Although these classifications are not exhaustive and representative of the types of people with whom NAMIWC interacts, we still believe that a classification scheme would greatly help NAMIWC identify its customer base. This in turn can aid NAMIWC in terms of services, fundraising, and volunteer recruitment.

Finding Two: Long-term recommendations

For the long-term, we think that when they create a new database, NAMIWC should develop more representative classification for membership. As stated earlier there are probably very important contacts and resources within the database that are not currently being used. With a better classification scheme it will be easier to keep track and manage those resources.

Second we believe the creation of a single graphical user interface (GUI) will make it easier for the office manager, volunteers, and other NAMIWC representatives who use the database. The GUI could be used so that they would not have to interact directly with the database interface, which can be confusing. The use of a GUI could also lead to consistent data being captured in the database by forcing the user to enter specific data (such as Name, Address, Membership, or Start Date) before being able to save a record. Also the GUI can have options for functionality not being used within the current database such as creating reports. The user would just have to sort the records and then highlight the records needed to be compiled into a report. In addition, the GUI could contain certain features that could address some of the problems that NAMIWC has with its current database. For example, there could be a feature which automatically calculates the membership expiration date once the user enters the membership start date. Also, a

new feature of using the GUI could be to automatically display the list of members whose memberships are expiring within 2 weeks and those members whose memberships have expired within the past seven days.

NAMIWC should also receive training on the new database from the database architect who creates the system. Since this system will be customized to their needs it should be easy for the office manager to gain a thorough understanding of the new system.

As for addressing the need to overcome the technology challenge, we believe that NAMIWC could receive training on QuickBooks and FileMakerPro 7 (membership database). Being that NAMIWC is a non-profit organization with tight budget constraints, we would encourage them to look at organizations which offer discount services to non-profit organizations or to use resources at the University of Michigan. For example, NAMIWC could find students at the School of Information or Ross School of Business who are familiar with the technology being used and have them come into the office and teach NAMIWC members how to use the software. One possibility is an internship experience that is related to the Community Information Corps at the School of Information. Non-profit database management is one way CIC students can do work for the public interest, and helping a small organization like NAMIWC solve their database problems would fit perfectly with the mission of the organization.

Finding Three

Finding Three: Office manager is the only person who interacts with the membership database

One of the major findings that we believe is inhibiting NAMIWC from reaching its goal of the Office Manager spending 80% of her time on non-administrative tasks is the fact that the Office Manager is the only person who interacts with the membership database (U01 Interview, Line 38). As evident in the sequence models, we found that the membership process is mostly dependent on her involvement (Appendix C, D, G, H, I). Furthermore, as stated earlier, the complexity of processing membership information in the membership database, along with the small physical office size, contributes to the reasons why she spends so much time interacting with the membership database.

Finding Three: Examples from Interview/Observations

Throughout our interview/observations, we found evidence of the office manager's profound involvement with the membership database. For example, during the process the office manager has a responsibility for entering new membership data into the local NAMIWC database (U01 Interview, Line 37) along with the responsibility for entering this information into the NAMI national database (U01 Interview, Line 90). The office manager is also currently responsible for printing the expiration letters and envelopes for expiring memberships (U01 Interview, Line 86). Furthermore, the office manager creates the thank you letter envelopes for the volunteer (U01 Interview, Line 86).

Finding Three: Short-term recommendations

We recognize that because of the current setup of the membership database it would be hard for NAMIWC to move to an environment where the office manager could focus on non-administrative tasks. However, in the short term we believe that she could set aside time when the office is closed to focus on those important administrative tasks such as entering membership data. By doing this the Office Manager will be able to dedicate open hours to outreach and resource gathering. Moreover, an added benefit will be that she will be less likely to be interrupted if she works on administrative tasks when the office is closed.

A second short-term recommendation is that the Office Manager could designate some of her current tasks to the volunteer. For example, she could have the volunteer print the thank you envelopes and letters, instead of having the volunteer printing just the thank you letters. By consolidating this step in the short term we feel this will give the Office Manager slightly more time to work on those tasks which are important to her.

Finding Three: Long-term recommendations

All of the long-term recommendations are based on the premise of the creation of a single multifunctional database to which both the office manager and the volunteer(s) would have access. To do this NAMIWC would need to network their computers so that volunteers would gain access to the database. The network would then make it possible for volunteers to work on the membership database.

There are several important factors that NAMIWC needs to keep in mind about networking the computers. With volunteer(s) having access to members' information and NAMIWC financials, we believe that there should be network administration privileges so that the office manager has full access to the systems records, while volunteers and other members of NAMIWC would have selective access rights to membership contact information and those fields which are needed for their tasks. This would protect NAMIWC and also enforce a standard of privacy of members' financial data.

In addition to privacy, the other factor to keep in mind is that the two computers need to have compatible operating systems and software in order to "talk" to each other and maximize the benefits of the connection. This problem is easily solved by ensuring both computers use the same operating system and software suite. It would be easiest to load both computers with the same version of the Microsoft Windows operating system.

Another related recommendation, we believe NAMIWC should adopt a universal software package such as Microsoft Office. Since it is a universally used program, most people have experience using it may be easier for people to learn and use. In addition to the popularity of this software, choosing a suite like Microsoft Office will ensure that the office manager is able to send and receive documents in a standard format any of her contacts can use. Also, Microsoft Office is paired with an extensive online help and reference service that will be useful for the office manager and volunteers while they are learning to use the software. If the office manager becomes proficient using Microsoft products, she may option to use a customized version of

Microsoft Office Access, the database software in the Microsoft Office Suite, for its new database. Additionally, since one of the goals of NAMIWC is to provide volunteers with transferrable skills and Microsoft Office is used in nearly every office, it would help NAMIWC to achieve that goal by giving volunteers experience with a nearly universally adopted software package.

NAMIWC should also create a simple, yet comprehensive training manual. Since NAMIWC volunteers have different levels of comfort and skill levels in using computer technology, this training manual would have to be constructed in a way that a beginner could just pick it up and use the database from referencing the manual. As a result we recommend that this training manual include step by step screen shots of common tasks that volunteers would perform. As a result, this manual will be beneficial to helping any new volunteer learn how to use the database and would decrease the amount of time the office manager has to spend training new volunteers.

A fourth recommendation involves NAMIWC eventually moving to a setup where volunteers work on most of the membership database tasks. We believe that it is quite possible for the office manager to give the majority of the responsibilities to the volunteers including entering membership data to the local NAMIWC database and national NAMIWC database, updating membership data, and creating expiration and thank you letter envelopes.

As a final recommendation to complement the previous ones, we believe that in order for NAMIWC to reach its goal and our recommendations to be fully effective that NAMIWC needs to increase its volunteer recruitment efforts. If NAMIWC could place a volunteer in the office every time the office manager was present, the volunteer could work on those administrative tasks, while the office manager could focus on other tasks and provide minimal supervision to volunteers.

Conclusion

In summation, we observed two valuable aspects of the NAMIWC organization that should be maintained. First, the organization appreciates and promotes their culture of inclusivity, and will not give that valuable social tool up for efficiency. Second, the staff uses triggers, such as dates or laying out the day's work in order of importance, to remind them to do office work, and to prepare it efficiently.

We had three overarching findings that we believe we should call to NAMIWC's attention. These findings should help focus the organization on the most important problems that are often at the root of other troubles. Finally, we believe that we have explained some viable solutions both in the short term and the long term. The short term solutions can be put into place immediately and should result in a reduction of time the office manager spends on office tasks. The long term recommendations will take more time and effort, but with some investment of time and the aid of outside help (community resources or hired information architects) should eventually help to make NAMIWC office work more efficient.

The first finding concerned the complexities of the current processing of membership data. We suggest some short term solutions, such as creating a chart to keep track of membership

expiration dates, and some long term solutions, including consolidating membership processing into one database.

The second overarching finding was that the database does not display who the NAMIWC membership is, so NAMIWC is not able to use the data fully. A short term solution is to utilize the current membership level indications (Family, Member, Student, etc.). A long term solution is to build a graphical user interface (GUI) into the database. The user interface would be simpler for the office manager and volunteers to use, because it would look more like the membership forms, and less like a database.

The third and final finding is that the office manager is currently the only person who interacts with the membership database. We have already cited this fact several times, and it is apparent in the sequence models that membership database tasks take up a majority of the office manager's time. To rectify the problem, a short term solution is to designate tasks related to the work the volunteer is already doing to the volunteer, such as printing out the thank you letter and expired membership envelopes. A long term plan is to develop a single, multifunction database that would include all the membership data that would be accessible for both the office manager and the volunteer. This would require networking the computers, so both could access the database. Also in the interest of simplifying the software for ease of use, we recommended purchasing a software suite, such as Microsoft Office, so the office manager would find it easier to manipulate documents in any format.

Through implementing the short-term recommendations, we believe that NAMIWC will see a slight decrease in the amount of time spent on non-administrative tasks. Additionally, the long-term recommendations in conjunction with the new database will help NAMIWC reach or surpass the goal. Furthermore, we hope that the data collected and analyzed within this report will be beneficial to other future projects that NAMIWC believes will help improve the organization.

As a final note, the members of the team would like to thank NAMIWC for inviting us into their organization to conduct this analysis. We very much appreciate the opportunity to observe daily tasks and conduct interviews with members of NAMIWC so that we could conduct a thorough, detailed analysis of NAMIWC. We hope that our recommendations, in conjunction with those things currently being done well at NAMIWC, will help to improve the NAMIWC organization and further assist in defining its overall mission. We believe that if NAMIWC takes into consideration the recommendations discussed in the report that they will ultimately reach their goals of the office manager spending eighty percent of her time working on non-administrative tasks and creating a learning environment that empowers volunteers to gain transferable skills.

Once again, we would like to thank NAMIWC for allowing us to work with them this semester and hope that they find added value and benefit from our analysis and findings.

Appendix A

Interview List

In this report, all the data is cited by the interviewed NAMIWC representative, and the line number from the interview. This interview list will help NAMIWC connect our findings to key members of their own organization who can implement our various recommendations.

U03 (Chief Information Officer) Wednesday October 4 1:30 to 3:00 Entire group

U01 (Office Manager) Monday October 9 11 to 12:30. Interviewer: Anne Thomason and Notetaker: Gregory Young

U01 Follow Up-Interview 1 (Office Manager) Monday October 16 10:30- 12:00 Interviewer: Anne Thomason and Notetaker: Amy Barritt

U02 (Treasurer) Monday October 9 12:30-1:30 Interviewer: Anne Thomason and Notetaker: Gregory Young

U05 (observation of Board of Directors meeting) Wednesday October 11 7:15-9:15 Entire group

U04 (volunteer), Thursday October 19 11:30- 1:00 Interviewer: Amy Barritt and Notetaker: Shawn Martin

U01 Follow-Up Interview 2, Thursday October 19, 1:00-2:00, Interviewer: Shawn Martin, and Notetaker: Amy Barritt.

Appendix B

Sequence Model 1

Each sequence model we developed from our interview data will be useful for NAMIWC. The sequence models can be used to help the organization see more clearly redundancies and efficiencies they would like to change. These sequence models are also a big step toward helping NAMIWC develop an office manual to use with volunteers. Several of the sequence models also speak to the way the membership database is currently used, and so outlines what would be beneficial in a future database.

Break downs (indicated by a BD, and are in all capitals) indicate where in the task there were errors that needed to be looked at. In many cases, finding a way to automate the task eliminated the break down. Questions are in italics, and were either points we needed to clarify to make a good recommendation, or they were our own design ideas.

Title: Data migration to resolve payroll issue (U02 Interview Line 69)

Intent: Migrate data from Quicken to QuickBooks so that NAMIWC will be able to handle own payroll and have one database for all finance related tasks (U02 Interview line 68 and 69)

Trigger: U02 arrives at office (U02 Interview line 61 and 62)

?

U01 gets print out of old database from folder on her desk (U02 Interview line 71 and 72)

?

U01 finds record last entered by paper marker (U02 Interview line 76)

?

U01 reads entry out loud and watches U02 (U02 Interview line 71)

Intent: U01 watches to learn how to use database (U02 Interview line 76)

BD: TEAM OBSERVED U01 WAS FRUSTRATED
WITH PROCESS, NOT LEARNING FROM IT (U02 Interview line 71)

?

U02 enters data in QuickBooks (U02 Interview line 72)

?

BD: U02 SPENDS 5-10 MINUTES IN HELP MENU
TO FIGURE OUT HOW TO CREATE A NEW FIELD FOR DATA (U02 Interview line 73)

?

BD: U02 HAS DIFFICULTY CORRECTING MISTAKE
IN BALANCE TOTAL, COULD NOT CHAGE/DELETE
OR REMAKE A RECORD, SPENT 15 MINUTES BEFORE
GIVING UP (U02 Interview line 73)

?

U02 spends around one hour with U01, shuts down QuickBooks (U02 Interview line 85)

Appendix C

Sequence Model 2

Each sequence model we developed from our interview data will be useful for NAMIWC. The sequence models can be used to help the organization see more clearly redundancies and efficiencies they would like to change. These sequence models are also a big step toward helping NAMIWC develop an office manual to use with volunteers. Several of the sequence models also speak to the way the membership database is currently used, and so outlines what would be beneficial in a future database.

Break downs (indicated by a BD, and are in all capitals) indicate where in the task there were errors that needed to be looked at. In many cases, finding a way to automate the task eliminated the break down. Questions are in italics, and were either points we needed to clarify to make a good recommendation, or they were our own design ideas.

Title: Initial file of membership checks

Intent: Prepare checks for entry into database

Trigger: Get membership form and dues check in mail

?

Attach form and check with a paper clip (U01 Interview Line 40)

?

Put in Membership Forms folder (manila bi-fold) (U01 Interview Line 39)

?

Puts folder in fireproof box under U01's desk (U01 Interview Line 39)

?

Collect checks for up to one week

Intent: U01 has time set aside once a week for entering information into database, longer than one week messes up member's finances

Appendix D

Sequence Model 3

Each sequence model we developed from our interview data will be useful for NAMIWC. The sequence models can be used to help the organization see more clearly redundancies and efficiencies they would like to change. These sequence models are also a big step toward helping NAMIWC develop an office manual to use with volunteers. Several of the sequence models also speak to the way the membership database is currently used, and so outlines what would be beneficial in a future database.

Break downs (indicated by a BD, and are in all capitals) indicate where in the task there were errors that needed to be looked at. In many cases, finding a way to automate the task eliminated the break down. Questions are in italics, and were either points we needed to clarify to make a good recommendation, or they were our own design ideas.

Title: Update database with check and new membership information

Intent: Process membership information

BD: PHONE CALLS INTERRUPTING SEQUENCE ARE A POTENTIAL BREAKDOWN

Trigger: One week has elapsed since last database update

Trigger: U01 has time

*Team unsure of the timeline between entering information in database
to depositing checks in bank*

?

U01 pulls Membership Forms folder out from fireproof box under desk

?

Alphabetize membership forms in folder

BD: HAD DIFFICULTY SORTING PAPERS BECAUSE PAPERCLIPS
KEPT STICKING TOGETHER (U01 Interview Line 42)

?

Puts date and name in paper log book (U01 Interview Line 43)

Intent: paper log book is easier to use to enter data in national database

Could U01 print new records rather than recording information in two places?

How long is paper record kept?

?

Open membership database in Filemaker Pro 7

?

Search for person's name (U01 Interview Line 45)

Intent: see if they are already in database

?

Trigger: IF: U01 does not find previous record in database

Intent: indicates a new member, new record needs to be created

?

Create new record in database

?

Enter name, contact information, information from membership form
Get copy of membership form and database record
(this sequence continues at step 14, 'click on link to payment record')

?

Trigger: IF: U01 finds a matching record in database
Intent: indicates renewal membership, update old record

?

U01 updates record with information on membership form (contact info)

?

Update expiration date in comment field (U01 Interview Line 45)

?

Update postal code (U01 Interview Line 48)

?

Click on link to payment record

What kind of information is kept? Is it used?

BD: NOT ALL FIELDS IN RECORDS MATCHED FIELDS
IN MEMBERSHIP FORM. CONFUSING.

?

Update information from membership form

?

Update paper log with check number and amount

?

Put form in "Need Thank You Letter" (U01 Interview Line 54)

?

Put check in "Need to be Copied" folder (U01 Interview Line 55)

Is this an unnecessary step?

What triggers copying?

BD: U01 IDENTIFIED AS UNNECESSARY STEP

?

U04 copies checks (U01 Interview Line 82)

?

U01 files check copies

?

U01 takes checks to bank (U01 Interview Line 56 & 84)

?

U01 receives deposit slip

?

U01 staples deposit slip to copied checks

Appendix E

Sequence Model 4

Each sequence model we developed from our interview data will be useful for NAMIWC. The sequence models can be used to help the organization see more clearly redundancies and efficiencies they would like to change.

Break downs (indicated by a BD, and are in all capitals) indicate where in the task there were errors that needed to be looked at. In many cases, finding a way to automate the task eliminated the break down. Questions are in italics, and were either points we needed to clarify to make a good recommendation, or they were our own design ideas.

Title: Free Newsletter Request

Intent: Send newsletters to prospective members (U01 Interview Line 54)

Trigger: U01 Receives request by email, phone, or personal contact for
3 free newsletters (monthly issued) (U01 Interview Line 50)

?

Checks email and phone messages first thing upon arriving to office (U01 Interview Line 16)

?

Finds request

?

Opens database for immediate entry

?

Checks to see if record already exists

*What happens when someone who has already received free newsletters
requests again?* (U01 Interview Line 38)

?

Creates new record (U01 Interview Line 39)

?

Inputs all contact information on database record form (U01 Interview Line 39)

?

Inputs date of expiration of last free news letter (Mo/Yr) in comments section

Intent: remind U01 of when to send person a letter asking them to join (U01 Interview Line 52)

?

BD: INCORRECT DATES INPUTED. CONFUSING FOR U01
TO COUNT IN HER HEAD. (U01 Interview Line 53)

Would a chart above her computer with dates help?

?

Inputs "FNL" (free news letter) in comments section

Intent: identify level of membership, reminds U01 to send membership forms to this record (U01
Interview Line 52)

Appendix F

Sequence Model 5

Each sequence model we developed from our interview data will be useful for NAMIWC. The sequence models can be used to help the organization see more clearly redundancies and efficiencies they would like to change. These sequence models are also a big step toward helping NAMIWC develop an office manual to use with volunteers.

Break downs (indicated by a BD, and are in all capitals) indicate where in the task there were errors that needed to be looked at. In many cases, finding a way to automate the task eliminated the break down. Questions are in italics, and were either points we needed to clarify to make a good recommendation, or they were our own design ideas.

Title: Answering Office Phone

Intent: Help callers find information and resources (U01 Interview Line 23)

Trigger: Phone rings

?

U01 stops current task (U01 Interview Line 17)

Potential breakdown of not being able to start where she left off

?

Pulls out phone log, located on her desk next to monitor, while she is talking (U01 Interview Line 26)

?

Assesses needs of caller (U01 Interview Line 27)

?

Finds information in filing cabinet

BD: COULD NOT FIND INFORMATION SHE WAS LOOKING FOR (U01 Interview Line 28)

Is alphabetical sort most useful?

?

Provides information, referrals and support to caller (U01 Interview Line 27)

?

Asks caller for information for phone log (basic contact info)

?

Writes down contact information and nature of call (U01 Interview Line 27)

?

Trigger: If caller asks for free news letter, initiate sequence (U01 Interview Line 50)

?

Ends call

?

Files phone log (U01 Interview Line 27)

What is information used for? U01 indicated nothing happens with it.

In future, may be used to assess needs of organization

Appendix G

Sequence Model 6

Each sequence model we developed from our interview data will be useful for NAMIWC. The sequence models can be used to help the organization see more clearly redundancies and efficiencies they would like to change. These sequence models are also a big step toward helping NAMIWC develop an office manual to use with volunteers. Several of the sequence models also speak to the way the membership database is currently used, and so outlines what would be beneficial in a future database.

Break downs (indicated by a BD, and are in all capitals) indicate where in the task there were errors that needed to be looked at. In many cases, finding a way to automate the task eliminated the break down. Questions are in italics, and were either points we needed to clarify to make a good recommendation, or they were our own design ideas.

Title: Copying membership dues checks

Intent: Make copy of checks deposited for financial record

Trigger: U01 gives check folder to U04

?

U04 walks to copy machine down the hall (U04 Interview Line 26)

?

Lay 4-5 checks down on copy machine glass (U04 Interview Line 27)

?

Copies checks

?

Repeats until all checks are copied

?

Staples copied checks together (U04 Interview Line 27)

?

Walks back to office

?

Gives U01 checks in folder and check copies (U04 Interview Line 28)

?

U01 files check folder in fireproof box under desk and files check copies in filing cabinet (U04 Interview Line 28)

Appendix H

Sequence Model 7

Each sequence model we developed from our interview data will be useful for NAMIWC. The sequence models can be used to help the organization see more clearly redundancies and efficiencies they would like to change. These sequence models are also a big step toward helping NAMIWC develop an office manual to use with volunteers. Several of the sequence models also speak to the way the membership database is currently used, and so outlines what would be beneficial in a future database.

Break downs (indicated by a BD, and are in all capitals) indicate where in the task there were errors that needed to be looked at. In many cases, finding a way to automate the task eliminated the break down. Questions are in italics, and were either points we needed to clarify to make a good recommendation, or they were our own design ideas.

Title: Thank you letter for new and renewal membership forms received

Intent: Inform members of status and new expiration date, let members know that correspondence and check was received

Trigger: U01 receives membership forms and dues check in mail

?

Initiate and complete U01 sequence #2: update database with membership check and new membership information (U01 Interview Line 32-45)

?

U01 prints addresses on envelopes (U04 Interview Line 36)

?

U01 prints letterhead on her computer (U04 Interview Line 37)

BD: U04 DOES NOT HAVE LETTERHEAD FILE ON VOLUNTEER COMPUTER, CAN LEAD TO BACKUPS IF U01 IS NOT AVAILABLE TO PRINT MORE (U04 Interview Line 38)

?

U01 puts explanation post-it note on envelopes, explaining what letter needs to be printed to U04 (U04 Interview Line 39)

Intent: U01 does not have to verbally explain each letter to U04. U04 can judge which form letter to use, task can be done without U01 being present. (U04 Interview Line 2)

?

U01 puts letterhead and addressed envelopes on U04's desk (U04 Interview Line 37)

?

U04 arrives at office (U04 Interview Line 40)

?

Imports files from jump-drive to volunteer's computer (U04 Interview Line 40)

?

Opens correspondence folder on volunteer's computer (U04 Interview Line 42)

?

Finds appropriate form letter (U04 Interview Line 42)

BD: TEAM NOTED DISORGANIZATION OF LETTER TYPES AND TITLES, U04 SEARCHED FOR CORRECT FORM FOR AROUND 30 SECONDS (U04 Interview Line 45)

?

Updates name, address, membership expiration date, membership dues paid (U04 Interview Line 41)

BD: TEAM OBSERVED THAT U04 MADE TYPOS AND MODIFIED THE LETTER BEYOND THESE ITEMS (U04 Interview Line 44)

?

Prints letter on letterhead

?

Signs NAMIWC president's signature (U04 Interview Line 44)

?

Stuffs envelopes

?

Mails envelopes

U04 mentioned that she mails the letters, team not sure where stamps come from (Interpretation Session)

Appendix I

Sequence Model 8

Each sequence model we developed from our interview data will be useful for NAMIWC. The sequence models can be used to help the organization see more clearly redundancies and efficiencies they would like to change. These sequence models are also a big step toward helping NAMIWC develop an office manual to use with volunteers. Several of the sequence models also speak to the way the membership database is currently used, and so outlines what would be beneficial in a future database.

Break downs (indicated by a BD, and are in all capitals) indicate where in the task there were errors that needed to be looked at. In many cases, finding a way to automate the task eliminated the break down. Questions are in italics, and were either points we needed to clarify to make a good recommendation, or they were our own design ideas.

Title: Reminder letter for lapsing and expired memberships

Intent: Inform members of status and encourage renewals

Trigger: U01 notes expiring memberships in database

Trigger: Near end of quarter

?

U01 compiles list of memberships expiring in 1.5 months in database (U04 Interview Line 33)

?

U01 prints addresses on envelopes (U04 Interview Line 36)

?

U01 prints letterhead (U04 Interview Line 37)

BD: U04 DOES NOT HAVE LETTERHEAD FILE ON VOLUNTEER COMPUTER, CAN LEAD TO BACKUPS IF U01 IS NOT AVAILABLE TO PRINT MORE (U04 Interview Line 38)

?

U01 puts explanation post-it note on envelopes, explaining what letter needs to be printed to U04 (U04 Interview Line 2)

Intent: U01 does not have to verbally explain each letter to U04. U04 can judge which form letter to use, task can be done without U01 being present. (U04 Interview Line 39)

?

U01 puts letterhead and addressed envelopes on U04's desk (U04 Interview Line 37)

?

U04 arrives at office (U04 Interview Line 40)

?

Imports files from personal jump-drive to volunteer's computer (U04 Interview Line 40)

?

Opens correspondence folder on volunteer's computer (U04 Interview Line 42)

?

Finds appropriate form letter (U04 Interview Line 42)

BD: TEAM NOTED DISORGANIZATION OF LETTER TYPES AND TITLES, U04 SEARCHED FOR CORRECT FORM FOR AROUND 30 SECONDS (U04 Interview Line 45)

?

Updates name, address, membership expiration date (U04 Interview Line 41)

BD: TEAM OBSERVED THAT U04 MADE TYPOS AND MODIFIED THE LETTER BEYOND THESE ITEMS (U04 Interview Line 44)

?

Prints letter on letterhead

?

Signs NAMIWC president's signature (U04 Interview Line 44)

?

Stuffs envelopes

?

Mails envelopes

U04 mentioned that she mails the letters, team not sure where stamps come from

?

Trigger: IF: U01 receives renewal membership form and dues check in mail

?

Initiate and complete U04 sequence #2 (U01 Interview Line 32-45, U04 Interview Line 36-43)

?

IF: U01 does not receive renewal membership form and dues check

?

Trigger: U01 notices membership has expired without renewal (U04 Interview Line 34)

Trigger: Near end of quarter (U04 Interview Line 32)

?

U01 compiles list of expired memberships in database (U04 Interview Line 34)

?

U01 prints addresses on envelopes (U04 Interview Line 36)

?

U01 prints letterhead (U04 Interview Line 37)

BD: U04 DOES NOT HAVE LETTERHEAD FILE ON VOLUNTEER COMPUTER, CAN LEAD TO BACKUPS IF U01 IS NOT AVAILABLE TO PRINT MORE (U04 Interview Line

38)

?

U01 puts explanation post-it note on envelopes, explaining what letter needs to be printed to U04 (U04 Interview Line 39)

Intent: U01 does not have to verbally explain each letter to U04. U04 can judge which form letter to use, task can be done without U01 being present (U04 Interview Line 2)

?

U01 puts letterhead and addressed envelopes on U04's desk (U04 Interview Line 37)

?

U04 arrives at office (U04 Interview Line 40)

?

Imports files from personal jump-drive to volunteer's computer (U04 Interview Line 40)

?

Opens correspondence folder on volunteer's computer (U04 Interview Line 42)

?

Finds appropriate form letter (U04 Interview Line 42)

BD: TEAM NOTED DISORGANIZATION OF LETTER TYPES AND TITLES, U04 SEARCHED FOR CORRECT FORM FOR AROUND 30 SECONDS (U04 Interview Line 45)

?

Updates name, address, membership expiration date (U04 Interview Line 41)

BD: TEAM OBSERVED THAT U04 MADE TYPOS AND MODIFIED THE LETTER BEYOND THESE ITEMS (U04 Interview Line 44)

?

Prints letter on letterhead

?

Signs NAMIWC president's signature (U04 Interview Line 44)

?

Stuffs envelopes

?

Mails envelopes

U04 mentioned that she mails the letters, team not sure where stamps come from

?

Trigger: IF: U01 receives membership renewal form and dues check

?

Initiate and complete U04 sequence #2 (U01 Interview Line 32-45, U04 Interview Line 36-43)

?

Trigger: IF: U01 does not receive membership renewal form and dues check within one month

Intent: give members as much time as possible to locate funds to secure membership or get in touch with the office (U01 Interview Line 35)

?

U01 removes postal code from member record in database. Former member no long receives newsletters. (U04 Interview Line 42-43)

Appendix J

Consolidated Sequence Model

This model is similar to the sequence models, but it aggregates the data. This model provides a different way of looking at the office tasks, as a series of dependent operations, not independent tasks.

Again, break downs in the tasks are indicated by all capitals, questions and recommendations are in italics, and the start of each task is indicated by bold font. We also use the word “triggers” in this model to indicate the impetus that prompts the office manager or other worker to start and complete a task. The intents are also spelled out, so that our group and NAMIWC can see what the task is suppose to accomplish and decide if there is a better way to do the task.

Keeping Track of Members, Potential Members, and Membership Status in Database

Triggers: Receive request for free newsletter;U01 receives renewal forms and dues check in mail; U01 has time(U01 Interview Line 50); U01 notes expiring memberships in database

Overall Intent: Process new members and renew old memberships in database for organization's records

Activities	Intents	Abstract Steps: Strategy 1	Breakdowns
File Forms	Easier to use when updating national database, than going between database screens	Alphabetize membership forms in folder (U01 Interview Line 42) Write information in paper log book (U01 Interview Line 43)	Why do forms need to be alphabetized? BD: DIFFICULT TIME SORTING, PAPERS GETTING CAUGHT (U01 Interview Line 41)
Enter or change information in database	To keep track of membership and those interested in learning more about organization	Enter information in database (U01 Interview Line 45) Open membership database in FilemakerPro	

Search for person's name

If person is in database, update record, If person is not in database, create new record
Update expiration date in comment field (U01 Interview Line 45)
Update postal code (U01 Interview Line 48)
Click on link to payment record (U01 Interview Line 50)

BD: MISTAKES MADE WHEN U01'S ATTENTION IS DIVERTED BY ANSWERING THE PHONE (U01 Interview Line 17)

BD: CONFUSING DATABASE, NOT ALL FIELDS ON MEMBERSHIP FORM AND PAYMENT RECORD MATCH (U01 Interview Line 50)

Update information from membership form (U01 Interview Line 50)
Write check amount and number in paper log book (U01 Interview Line 43)
Put form in folder for thank you notes.
Folder title: Need Thank You Letter (U01 Interview Line 54)
Put checks in "Need to be Copied" folder (U01 Interview Line 55)

Recording of Free Newsletter Request

Interest people into becoming members (U01 Interview Line 54)

Find and record requests as they come in (U01 Interview Line 51)

**Copy Membership
Dues Checks**

	Check email, phone messages first thing in morning (U01 Interview Line 16) Find request	
Keep a record of who is/has received newsletters (U01 Interview Line 4)		
Limit abuse of free newsletter system (U01 Interview 2 Line 31)	Open database for immediate entry upon receipt Check to see if record already exists (U01 Interview Line 38) Create new record (U01 Interview Line 39)	
Remind U01 of expirations	Enter basic contact information (U01 Interview Line 39) Input date of expiration in Comments section (U01 Interview Line 52)	BD: INCORRECT DATES INPUTED. CONFUSING TO COUNT AHEAD (U01 Interview Line 53)
Remind U01 to invite person to become member	Input "FNL" (free news letter) code in Comments section (U01 Interview Line 52)	
Create paper copies of checks deposited for financial record		
	U04 makes copies of checks U04 walks to copy machine (U04 Interview Line 26) Lays 4-5 checks down on copy machine glass (U04 Interview Line 27) Copies checks	

Create Thank you letter for new and renewal membership forms received

Easier to file without getting deposits mixed up (U04 Interview Line 25)

Repeats until all checks are copied
Staples copied checks together (U04 Interview Line 27)

Walks back to office
Gives U01 checks in folder and copied checks (U04 Interview Line 28)
U01 files check folder and check copies (U04 Interview Line 28)

Inform members of status and new expiration date, let members know that correspondence and check was received

Keep records up to date (U01 Interview Line 30)

U01 enters information in database
See U01 sequence #2: Update database with membership check and new membership information (U01 Interview Lines 32-45)

U01 prepares for U04 to make and mail letters
U04 can complete task without specific instructions from U01 (U04 Interview Line 2)

U01 prints addresses on envelopes (U04 Interview Line 36)

U01 prints out letterhead (U04 Interview Line 37)

BD: U04 DOES NOT HAVE LETTERHEAD FILE ON VOLUNTEER COMPUTER, CAN LEAD TO BACKUPS IF U01 IS NOT AVAILABLE TO PRINT MORE (U04

Intent: U01 does not have to verbally explain each letter to U04. U04 can judge which form letter to use, task can be done without U01 being present (U04 Interview Line 2)

Intent: make sure she is always using the most up-to-date form (U04 Interview Line 40)

U01 puts explanation post-it note on envelopes, explaining what letter needs to be printed to U04 (U04 Interview Line 39)
U01 puts letterhead and addressed envelopes on U04's desk (U04 Interview Line 37)
Trigger: U04 arrives at office (U04 Interview Line 40)
U04 imports files from personal jump-drive to volunteer's computer (U04 Interview Line 40)
Opens correspondence folder on volunteer's computer (U04 Interview Line 42)

Finds appropriate form letter (U04 Interview Line 42)

BD: TEAM NOTED DISORGANIZATION OF LETTER TYPES AND TITLES, U04 SEARCHED FOR CORRECT FORM FOR AROUND 30 SECONDS (U04 Interview Line 45)

Updates name, address, membership expiration date, membership dues paid (U04 Interview Line 41)

BD: TEAM OBSERVED THAT U04 MADE TYPOS AND MODIFIED THE LETTER BEYOND THESE ITEMS (U04 Interview Line 44)

Intent: makes membership feel good about organization, but also allows task to be completed efficiently (U04 Interview Line 44)

Prints letter on letterhead
Signs NAMIWC president's signature (U04 Interview Line 44)
Stuffs envelopes
Mails envelopes

Create Reminder letter for lapsing and expired memberships

Inform members of status and encourage renewals

So task can be completed without U01 being present (U04 Interview Line 2)

U01 prepares for U04 to make and mail letters
U01 compiles list of memberships expiring in 1.5 months in database (U04 Interview Line 33)
U01 Prints addresses on envelopes (U04 Interview Line 36)
U01 Prints letterhead (U04 Interview Line 37)

BD: U04 DOES NOT HAVE LETTERHEAD FILE ON VOLUNTEER COMPUTER, CAN LEAD TO BACKUPS IF U01 IS NOT AVAILABLE TO PRINT MORE (U04 Interview Line 38)

U01 does not have to verbally explain each letter to U04. U04 can judge which form letter to use, task can be done without U01 being present (U04 Interview Line 2)

U01 puts explanation post-it note on envelopes, explaining what letter needs to be printed to U04 (U04 Interview Line 39)
U01 puts letterhead and addressed envelopes on U04's desk (U04 Interview Line 37)

U04 makes and mails letters

Frees U01's time; U04 does task at work to avoid mix-ups; only time she has to do task (U04 Interview Line 2)
make sure she is always using the most up-to-date form (U04 Interview Line 40)

U04 imports files from personal jump-drive to volunteer's computer (U04 Interview Line 40)
Opens correspondence folder on volunteer's computer (U04 Interview Line 42)
Finds appropriate form letter (U04 Interview Line 42)

BD: TEAM NOTED DISORGANIZATION OF LETTER TYPES AND TITLES, U04 SEARCHED FOR CORRECT FORM FOR AROUND 30 SECONDS (U04 Interview Line 45)

Updates name, address, membership expiration date (U04 Interview Line 41)

BD: TEAM OBSERVED THAT U04 MADE TYPOS AND MODIFIED THE LETTER BEYOND THESE ITEMS (U04 Interview Line 44)

Prints letter on letterhead

**Create Second
Reminder Letter for
Membership
Expiration**

makes membership
feel good about
organization, but
also allows task to
be completed
efficiently (U04
Interview Line 44)

Signs NAMIWC
president's signature
(U04 Interview Line
44)
Stuffs envelopes
Mails envelopes

give membership
several opportunities
to renew (U04
Interview Line 35-
36)

U01 notices
membership has
expired without
renewal (U04
Interview Line 34)
U01 compiles list of
expired
memberships in
database (U04
Interview Line 34)
U01 Prints
addresses on
envelopes (U04
Interview Line 36)
U01 prints
letterhead (U04
Interview Line 37)

BD: U04 DOES NOT
HAVE LETTERHEAD
FILE ON
VOLUNTEER
COMPUTER, CAN
LEAD TO BACKUPS
IF U01 IS NOT
AVAILABLE TO
PRINT MORE (U04
Interview Line 38)

U01 does not have
to verbally explain
each letter to U04.
U04 can judge
which form letter to
use, task can be
done without U01
being present. (U04
Interview Line 2)

U01 puts
explanation post-it
note on envelopes,
explaining what
letter needs to be
printed to U04 (U04
Interview Line 39)

U01 puts letterhead and addressed envelopes on U04's desk (U04 Interview Line 37)
U04 makes and mails expired membership letters, U04 arrives at office (U04 Interview Line 40)
U04 imports files from personal jump-drive to volunteer's computer (U04 Interview Line 40)
Opens correspondence folder on volunteer's computer (U04 Interview Line 42)
Finds appropriate form letter (U04 Interview Line 42)

Intent: make sure she is always using the most up-to-date form (U04 Interview Line 40)

BD: TEAM NOTED DISORGANIZATION OF LETTER TYPES AND TITLES, U04 SEARCHED FOR CORRECT FORM FOR AROUND 30 SECONDS (U04 Interview Line 45)

Updates name, address, membership expiration date (U04 Interview Line 41)

BD: TEAM OBSERVED THAT U04 MADE TYPOS AND MODIFIED THE LETTER BEYOND THESE ITEMS (U04 Interview Line 44)

Prints letter on letterhead

Intent: makes membership feel good about organization, but also allows task to be completed efficiently (U04 Interview Line 44)

Signs NAMIWC president's signature (U04 Interview Line 44)
Stuffs envelopes

Weed out expired memberships from mailing list

Intent: give membership ample time to renew; call office if they are having difficulty locating funds to secure membership (U04 Interview Lines 35-36)

Mails envelopes

Initiate U04 Sequence #2 (U01 Interview Lines 32-45, U04 Interview Lines 36-43)

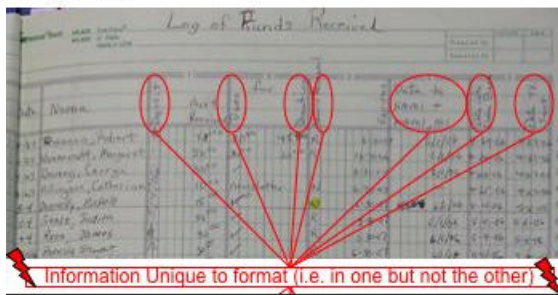
U01 removes postal code from member record in database (U01 Interview Line 42)
Expired member no longer receives newsletters (U01 Interview Line 43)

Appendix K

Artifact Model

These two artifacts are used primarily to capture information from membership forms (a form containing basic contact info like name, address, phone number, and e-mail) into more standard formats which U01 and the volunteers of NAMI, Washtenaw County can access. Additionally, the logbook and database are used to integrate financial information such as the size of donations, membership expiration, and receipt of NAMI newsletters. U01 is also using this information to migrate into a new financial system (QuickBooks) U01 takes the information from the membership form and puts it into both the logbook and then also uses the membership form to input data in the database. There is very little interaction between these two artifacts. Primarily, U01 maintains two forms to facilitate entry of data more easily into the state and national databases, but has noted that there are problems with this (U01, Interview line 55). This model shows how so far U01 has chosen to represent her information, how inefficient it is to transfer from one format to the other, and how it might be possible to consolidate the two forms into one.

Logbook



Intent: To provide easy transfer of information from membership forms to database (U01, Interview Line 43)

Usage: Takes data from membership forms to log book (U01, Interview Line 43)

Enters information about checks and processing (U01, Interview Line 32)

Breakdowns: Contains information not in database (whether money was dues or donation, when check was deposited, whether membership is new or renewal, and date information entered into national and state databases). Takes significant amount of time to update logbook and enter into database

Database

Intent: To serve as contact database for newsletters and correspondence, and to migrate data into electronic format (U01, Interview Line 54)

Usage: Takes data from membership forms and log book (U01, Interview Line 40)

Uses data to migrate into new financial system (Quickbooks) (U02, Interview Line 66)

Breakdowns: Information in logbook set up very differently. Database contains information not in logbook (type of membership, contact info). Database also contains two screens and U01 often uses comments field to enter information in logbook that is not in database and even information which does have field in database (U01, Interview Line 40)

Appendix L

Affinity Diagram

This is a photograph of one of the models we used, that compiled a lot of our interview data by groupings differently than other models had. Using these groupings (indicated by the highest level order (green) labels, we were able to draw our most definitive findings and recommendations. These findings and recommendations will positively impact the understanding and functioning of office work at NAMIWC.



Appendix M

Initial Memo to NAMIWC Board of Directors

Peter Landry, our contact person at NAMI, requested a memo about our project to present to the NAMIWC Board of Directors. We wrote the following memo to outline our goals, measurables, deliverables, and the process we planned to undertake. This document was also useful in keeping our group on track while refining the scope of our project and making recommendations. The document reminded our group of our intentions in aiding NAMIWC at every step during this process.

To: Board of Directors and Staff- National Association of Mentally Ill,
Washtenaw County

From: Administrative Process Analysts- School of Information, University of
Michigan

Date: September 30, 2008

Re: Administrative Process Analysis, October-December 2006

Introduction

NAMIWC board acting through Peter Landry with Barb Higman (office Administrator) and the instructional staff from the School of Information have arranged for a work group to aid the information needs of the National Association for the Mentally Ill, Washtenaw County (NAMIWC) and to provide an opportunity for the students to apply class work, including how to identify information tasks in an organization, what function the tasks serve, and how to improve information processing.

Objectives

The Administrative Process Analysts (APA) will work with the NAMIWC board, staff, and volunteers to:

- Identify critical information tasks in NAMIWC;
- Define those tasks;
- Rank them by importance;
- Develop diagrams to show information processes;
- Analyze the information processes;
- Provide recommendations for action to improve information processes.

Goals

With the information from APA's study, NAMIWC board members will better understand the information needs and deficiencies in the organization and be able to make informed decisions for the implementation of APA's recommendations as they relate to NAMIWC's future goals.

APA will give recommendations to improve the information processes of NAMIWC that will be based on current resources (time of one office manager) and for a potential increase in resources (more volunteer staff).

Specific goals of NAMIWC that the APA hopes to facilitate are:

- Develop ideas that NAMIWC can provide to a database information architect;
- Outline information tasks NAMIWC can use to create process manuals that standardize information flow;
- Outline information tasks NAMIWC can use to create information process manuals for new volunteers and irregular volunteers with varying levels of competency;
- Recommend standardized information processing that will allow the office manager to focus on critical tasks for NAMIWC's development.

Measurables

One of the primary ideal outcomes of this study, identified by Mr. Landry, is the ability for NAMIWC to streamline information processing so that the office manager can spend less time on administrative work and more time on NAMIWC's development. To that end, APA's recommendations will

- State how information processing needs to be changed in order to provide the office manager with more time to devote to development activities;
- Analyze the current time the office manager spends on tasks;
- Identify redundant tasks;
- Suggest a time savings of up to 80% (assuming new volunteer resources can be found).

Deliverables

The APA will

- Provide summaries of all the data gathered;
- Produce recommendations to the NAMIWC board members and staff in a written report.
- Supply board members, through Mr. Landry, with progress reports of current findings

Process

The APA will need to interview NAMIWC board members, staff, and volunteers. The information gained from these interviews will inform the APA of all the information tasks included in the administration of NAMIWC. Interviews will include traditional interviews and observations of work processes. NAMIWC members should expect the interviews to last approximately one and a half hours.

The information garnered from the interviews will be realized in sequence models (flow diagrams) of NAMIWC-related information processes. The sequence models will be consolidated to show all the information triggers and responses integral to NAMIWC's administration.

These sequence models and the interview information will be further consolidated into an affinity diagram. The affinity diagram will show the hierarchy of informational tasks in NAMIWC, and will reflect NAMIWC's information processes, step by step. Using the affinity diagram, APA will be able to visualize information breakdowns, such as repetitive tasks or tasks that need more information. APA will then make recommendations to alter and streamline information processing in NAMIWC.

Conclusions

The APA believes that through this process, the report, and recommendations APA provides, NAMIWC will be able to streamline its administrative processes so that the office manager's time will be spent more efficiently, understand what information needs to be provided to a database architect, provide NAMIWC with ideas of workflows and workflow priorities that can be placed in a manual for volunteers

Members of the APA would like to thank NAMIWC in advance for their time and consideration, and we look forward to working with NAMIWC in what promises to be an exciting project.

Appendix N

Cultural Assessment Model

Member Identity

Job |-----X-----| Organization

Group Emphasis

Individual |-----X-----| Group

People Focus

Task |-----X| People

Unit Integration

Independent |-----X-----| Interdependent

Control

Loose |---X-----| Tight

Risk Tolerance

Low |---X-----| High

Reward Criteria

Performance |-----X-----| Other

Conflict Tolerance

Low |-----X-----| High

Means-Ends Orientation

Means |-----X-----| Ends

Open-System Focus

Internal |-----X-----| External

Member Identity: There is a very strong identification with the organization instead of with specific job tasks. U01 focuses on the good of the organization rather than her specific job, perhaps to her detriment at times when she works overtime with no pay to get tasks done, often when she does not have much energy (U01 Interview Line 87; U01 Follow-Up Interview Line 52; U03 Interview Line 28.) Furthermore, perhaps because the organization is a non-profit, members very much identify with the organization over their specific roles. Yet this is difficult to assess because as a non-profit organization, many Board members have jobs outside the organization that they also identify with (U03 Interview 31). They admitted to occasionally being exhausted with the work (U05 Interview Line 47). While tangential to the processes we are making recommendations on, it is important to remember the Board can only devote a small amount of time to advising on changes in office policy or processes.

Group Emphasis: As for day-to-day activities, there is a focus on individuals because there is only one employee in the office every day although there is a weekly volunteer and U02 comes in once a week for an hour (U02 Interview Line 61). However, at planning meetings the focus is on the well being of the group at meetings, so I think they lean towards finding consensus as a group even when it isn't efficient (U05 Interview Line 5 and Line 12; personal observation that Board meeting was too long and time was used inefficiently—but they took the time to listen to each other).

People Focus : The emphasis is definitely on people. Tasks must get done, but people always come before the process. Even U03 doesn't want to sacrifice the emphasis on people in order to increase efficiency (U03 Line 30, 38, 39). While U03 would like “to see less redundancy in tasks” (U03 Interview Line 20-21), at the same time U03 wants to increase aid to more people (U03 Interview Line 64). This contrast is an important consideration for our recommendations—the organization wants more efficiency in their office process, but wants to increase their communication with people. It is necessary to make recommendations that will not sacrifice their ability to help people as we help them with their membership database.

Unit Integration: They try to work as a coordinated unit with the Board of Directors making decisions together (U05 interview Line 28). Within the office, they work together as opposed to individual tasks whenever possible. People work together even when it might better to focus on individual efforts as in the case of the migration from Quicken to QuickBooks (U02 Interview Line 76-77).

Control: There is not much in the way of control or oversight. While there is an office handbook that is in various stages of being written, there are no hard and fast rules (U01 interview Line 2). There is little checking up on employees, and if someone makes a mistake, they try to find a solution or tell the person don't worry about it—making mistakes does not result in punishment. (U01Follow-Up Interview 18-19; U05 Interview Line 45). One example is U01 neglecting to

send in information to the state about the non-profit status of the organization; the board did not get upset with her at all and instead worked to find a solution (U05 Interview Line 45-46).

Risk Tolerance: None at all in terms of office functioning. U01 and U04 do not feel empowered to make changes, nor do they want to rock the boat very much (U04 interview Line 75, U01 Interview Line 38-39). U03 is interested in making changes, and has a high degree of interest in innovation, but nothing has come out of it so far (U03 Interview Line 22-26). U01 is definitely willing to consider changes to her work processes, but will not make the changes on her own (U01 Follow-up Interview Line 17).

Reward Criteria: There is no reward criteria based on performance. The organization strives to help people, including its employees and volunteers, in a learning environment (U03 Interview Line 31). There is not a reward system in place in this organization, other than helping the members.

Conflict Tolerance: In the office itself there is little conflict—but there are only 2-3 people in it over the course of the week. At the board meeting, there was some conflict. Everyone was allowed to talk and express their views and be listened to, even someone who was not on the board and probably would not have been allowed into such a meeting at other organizations (U05 interview Line 5, Line 20, Line 27). There is a high premium on listening to what people have to say; however, this also mandates that people are not afraid to say what they are thinking or feeling. To repeat from above, U04 is hesitant to speak her views or say how things might be better and feels that she is “not empowered to do things.” (U04 interview Line 75).

Means-End Orientation: They are definitely more interested in the outcome than the processes—at least up to this point. They want to help people. Now they are realizing their office may not be set up to help people as well as it could—so it is possible this aspect of their culture could shift in the future. (U03 Interview Lines 75-76) There does not appear to be any sort of evaluation of how well they serve their members. During the Board meeting, there were two heated discussions of whether members should be called customers (U05 Interview Lines 15, 21). One of the issues raised was if they coded members as customers, and could then show how they served them, the organization could get more grant money (U05 Interview 21, 42-43). They are struggling with this issue, as at least some members do not want to be considered customers. There are ramifications for how they set up their membership database—how the members are categorized in the database (U01 Interview Line 64-65).

Open-System Focus: I would say relatively high. They have to listen to their members, and plan events their members are interested in (U03 Interview Line 64-65, U05 observation from meeting overall; U01 Interview Lines 5-6).