Information Systems Analysis Team

Finding you a better solution is our dream

Systems Proposal
For The Seattle Chapter of the Council on American-Islamic Relations

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ISAT
Information Systems Analysis Team

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Ms. Corning:

We welcomed the opportunity to work with you and Seattle branch of the Council of American-Islamic Relations. The Information Systems Analysis Team (ISAT) has analyzed the materials you have supplied and now have a better understanding of what steps to be taken to accomplish your goals.

Our objective is to provide CAIR-Seattle with alternatives and provide you with a recommendation to your current information system. We feel that the main problems and issues revolve around the data collection, information storage, and information retrieval. We have provided a system proposal along with four alternatives that we believe will suit your organizational needs. Also included is our system recommendation for CAIR-Seattle based on one of the four alternatives. A brief overview of this recommendation can be found in the Executive Summary with more detail contained in the Systems Alternative and System Recommendation sections of the enclosed systems study.

There are a few of aspects of this proposal that we would like to draw to CAIR-Seattle's attention.

- The proposal envisions CAIR-Seattle creating new effective relationships with clients, managing data efficiently and tracking financial securities.
- The proposal foresees CAIR-Seattle maintaining the new system with the help of paid staff or volunteers.
- The proposal requires that training and education will be provided for the new data system.

Thank you for providing ISAT with the opportunity to provide CAIR-Seattle with a new information solution recommendation. We are excited to provide this study to you for your review and look forward to working with you in the future.

Sincerely,

Laila Almouanier
ISAT Communications Coordinator

ISAT - Laila Almouanier – Irene Chin – Graham Ford – Tina Norman
Ryan Prins – Aaron Smith – DT Tran

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Executive Summary

In this systems proposal, the Information Systems Analysis Team (ISAT) will present some of the problems identified at the Seattle chapter of the Council on American Islamic Relations (CAIR-Seattle), and suggest four possible solutions with descriptions of their organizational, financial and procedural costs and benefits. ISAT will then offer a recommendation based upon the analysis of the current system. A summary is included at the end of the proposal, in addition to an appendix that includes data collection instruments, interview transcripts, and other resources used in our analysis.

Based on the current information system, ISAT is recommending that CAIR-Seattle move forward with a solution that entails a QuickBooks software upgrade, a software application that will keep track of phone correspondence (iWYWO), and hardware upgrades to the current system. These upgrades are estimated to cost $3,473.96 for complete implementation of the system. This solution is referred to as the 'QuickBooks' solution.

The above cost will include all of the hardware and software products as well as the necessary peripheral products needed to get the system up and running. The training for QuickBooks is included in this cost. The training product is an 'in-the-box' solution and will be owned by the organization for future use at anytime.

A more in-depth breakdown of this solution is provided within this document. However, the main idea to extract is that this recommendation will help CAIR-Seattle (Council on American Islamic Relations Seattle Chapter) in various areas of their organization, to not only better utilize their staff and volunteers, but also provide more time to the staff for other tasks, like working with the Islamic-American Community.

Outline of Information Systems Study

- ► **Overview**

- ► **Organization Description**

- ► **Data Collection Process**

Overview

We were drawn to this client due to a systemic information problem that we considered to be challenging; therefore, making it a great learning opportunity for our group. Besides the technical challenge they presented, their mission, and nonprofit status offered a philanthropic opportunity beneficial to both parties. To properly assess this client's need, an extensive analysis was done using: face-to-face interviews, questionnaires, and analysis of secondary data. All of the interviews conducted were recorded and transcribed. The interview questions used for the analysis and the transcriptions of each interview are included in Appendix A.

Before we could begin our analysis, project feasibility needed to be determined. A feasibility study was conducted (Appendix B) and the project was found to be feasible. We then continued our analysis, which consisted of information that helped us better understand the organization as a whole, followed up by information that was focused in the area that we found to be the root of the problems we found. Our focus was on how software applications were used for the information management of members and donors.

Organization Description

CAIR-Seattle (Council on American Islamic Relations Seattle Chapter) is a nonprofit organization established to promote an accurate image of Muslims and defend their rights in the United States. As a recently formed chapter that started about a year ago in Washington, they currently have only one paid employee along with five board members and many volunteers. The chapter's annual budget is projected to be a little over $200,000 this year.

Data Collection Process

To initiate our analysis of CAIR-Seattle (Council on American Islamic Relations Seattle Chapter), we identified the key players in this organization. The initial contact with organization was made through a CAIR-Seattle board member, Rami Al-Kabra. He then contacted other board members to obtain approval for the information system study and analysis. Additionally, he e-mailed us the contact information of the person we should

contact to begin our analytic process. The first e-mail was introductory in nature. We explained who we were, what we intended to accomplish, and asked if they were in need of a system analysis. After receiving a response, which stated that they would like to be considered as our client, we sent a short follow-up email to confirm that we be continuing with them our analysis of their system.

After receiving the required information to get in touch with our main contact in the organization, we sent an introductory e-mail CAIR-Seattle's Manager, Michaela Corning. This e-mail contained information introducing ISAT, its purpose, and a brief questionnaire that would give us a general idea of what she did, and who the other key players in organization were along with their names and roles.

During this process, the use of secondary data assisted us in better understanding what CAIR-Seattle's focus was as an organization. It provided us with a better understanding on how the organization operated on the surface. After hearing back from Michaela we decided that it was appropriate to set up a face-to-face interview with her to get questions answered and to look at the process of her work with CAIR.

After reviewing the information gathered from the interview with Michaela, we decided a follow-up interview was appropriate in order to get more in-depth information. The follow-up was targeted towards our newly focused scope: data management within the organization.

It was then decided that a CAIR-Seattle Volunteer, Mohammed Khan, needed to be interviewed because he managed the accounting functions of CAIR-Seattle using QuickBooks. The interview itself was later followed by a short e-mail that asked which QuickBooks version he was using since this was not known when asked at the interview.

After focusing our attention to one part of the organization, which was on their existing software applications, interactions between these applications, and data storage, we needed to find out more information regarding their financial status. This information was needed in order to accurately calculate if proposals were economically feasible. To obtain this information we needed to speak to CAIR-Seattle's treasurer, Rami Al-Kabra. A face-to-face interview was arranged with him, but due to time constraints a questionnaire was sent via e-mail. Mr. Al-Kabra then returned a completed copy of this questionnaire via e-mail.

From the interview process a vast amount of vital information was gathered through the use of in-person interviews, e-mail, and questionnaires. We also collected secondary data

from the CAIR-Seattle (Council on American Islamic Relations Seattle Chapter) website (http://www.cair-seattle.org/) and the CAIR National website (http://www.cair-net.org). Further secondary data was also drawn from CAIR-Seattle's manager Michaela Corning.

The individuals in this analysis were studied in their behavior, their everyday roles and contributions, as well as their states of knowledge about the organization. These individuals are key contributors to the organization and their cooperation helped us gain what is needed to successfully complete this analysis. Thus, the data collection process helped to pinpoint evidence of problem areas within the organization's information system that are described in the next section of this report.

Results of Systems Study

► **Analysis of Current System**

► **Problem Statement**

Analysis of Current System

After our first interview enough data was collected to form the CAIR-Seattle (Council on American Islamic Relations Seattle Chapter) organizational chart (Appendix C) and data flow diagram (Appendix D). The organizational chart is a revised diagram of the organizational hierarchy that the interviewee, Michaela Corning, had provided (Appendix A) during her interviews. It represents a micro-level diagram concentrating on information flow within the organization. The key idea emphasized on the chart is the amount of information that goes through manager Michaela Corning and the separate storage mediums used.

When looking at the complete data flow diagram (Appendix D) one can see how data flows around the organization on a larger scale. A breakdown of the main problems within the organization will be discussed below using highlighted sections of the above mentioned data flow diagram.

Origin of Data
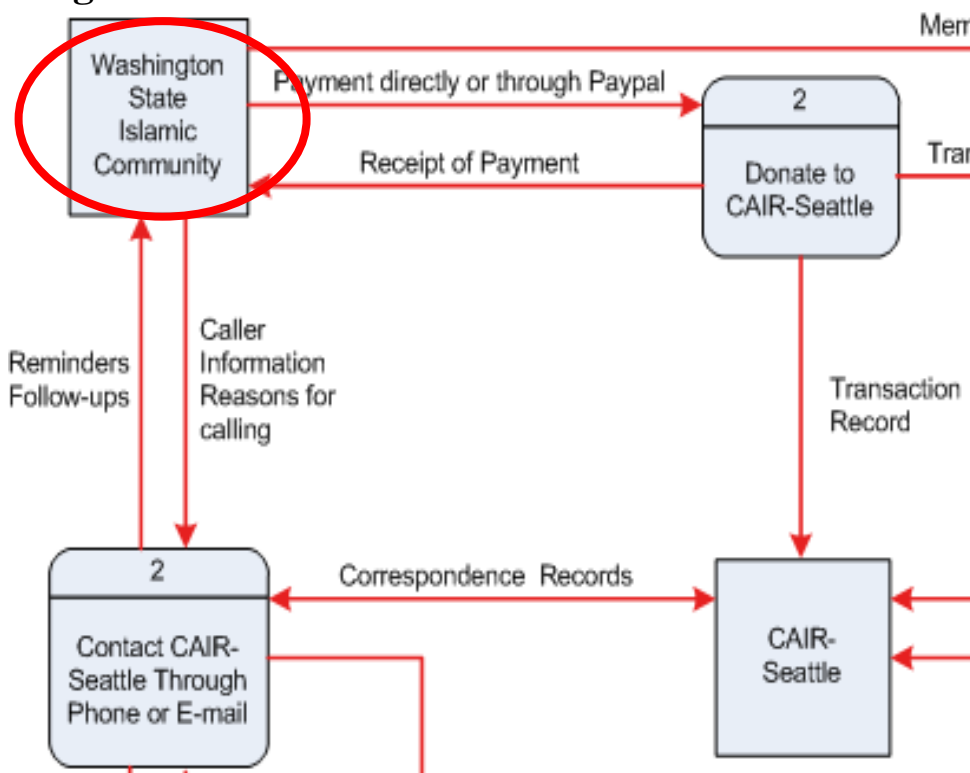
Figure 1: Origin of data diagram

All data that is obtained by the organization is from the members of the Washington State Islamic Community. This information is then used to create civil rights cases, build a member list, and to solicit donations. Without the information from the community CAIR-Seattle would not be able to serve the community that they were designed to serve. Also, information is received by the community. This information comes in the forms of follow-ups to phone correspondence or as a receipt of a payment on a donation. The majority of this information transfer is done by the one current full time staff, Michaela Corning.

Call Logging
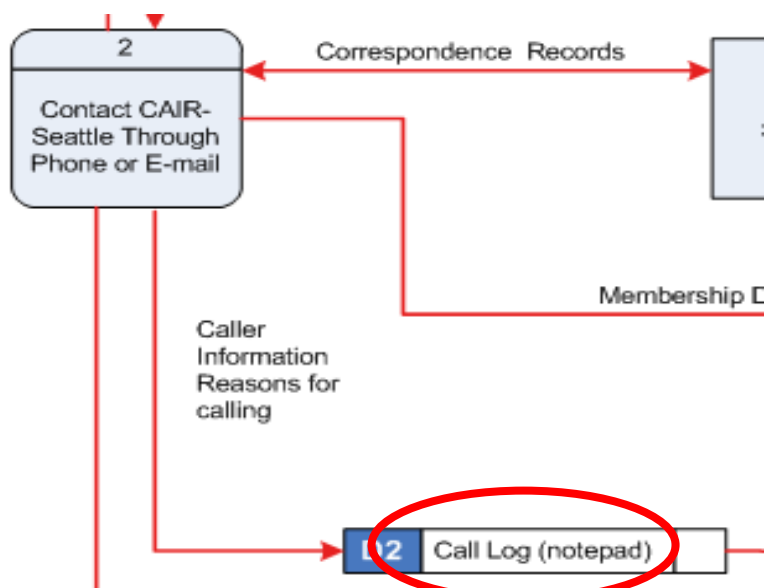
Figure 2: Call log process

One of the problems that CAIR-Seattle currently has involves the way their phone call logging is handled. Their current process involves all phone correspondence to be noted in a spiral notebook. This notebook contains all the call details (caller, intended recipient, reason for calling, need for call back) and is updated when call tasks are completed by either highlighting the call or crossing it out. However, if a call is not intended for the person who usually answers the organization's phone (Michaela Corning) it will need to be passed on to the appropriate person. An information access problem lies with passing on the needed information contained within the notebook. Because of human resource constraints and the amount of calls received, it may take days to pass on the needed information to the intended recipient and thus information timeliness becomes an issue.

Member Data Sharing
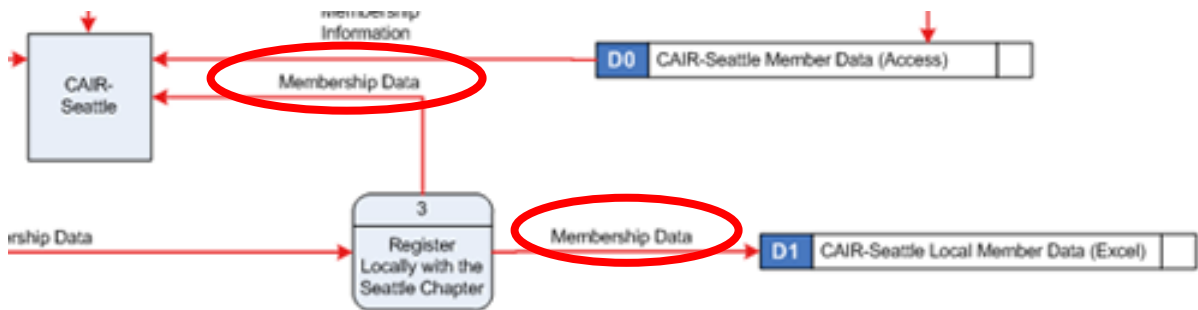
Figure 3: Membership data within Access and Excel

Figure 4: Donation data within QuickBooks

The membership data is stored in two separate locations for retrieval purposes and one for donation purposes. This separation of data creates redundant data. Also, by having separated data, there is no guarantee that accuracy is maintained. The problem of information accuracy arose in our analysis of this separation of information. For example, if a member moves, their contact information is updated in the membership data in one location but may not be updated in the donor information within QuickBooks.

Civil Rights Cases
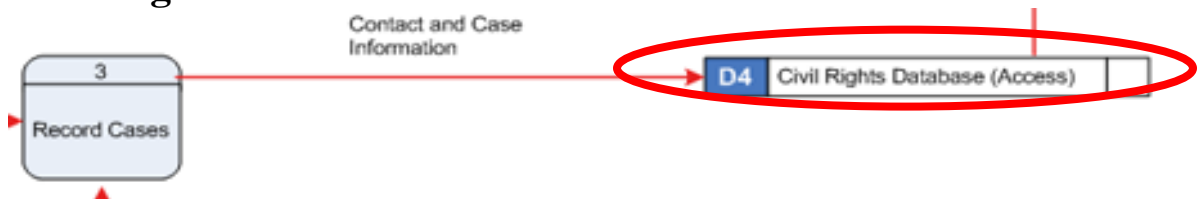
Figure 5: Civil rights cases data flow

Since the main purpose of CAIR-Seattle is to provide assistance for Islamic-Americans living in Seattle, it is important for proper logging of all civil rights cases that pass through the organization. Figure 5 depicts where the record cases are stored. The Access database that

the records are maintained in is sent to CAIR National every year. However, due to a lack of time by the one full time staff, this database is neglected and is not frequently updated.

Overview

From the above excerpts of the data flow diagram it should be noted that a main entity of data input into the organization is the Islamic community, whose data is then dispersed into many separate mediums of data storage (Access, Excel, QuickBooks, spiral notebook). This methodology is deemed efficient as the amount of data being input into the CAIR-Seattle entity is innumerable and the manager, Michaela Corning, is handling the vast majority of this input as she logs the data as quickly as she is capable of. However, the separation of data storage later leads to time spent reforming data for usage by other entities such as the CAIR National civil rights Access database, which requires an annual report of closed or ongoing civil rights cases. All in all, the data flow diagram verifies the problems identified from interview data analysis, which leads to the next section outlining the specific problem areas that were found.

Problem Statement

During our analysis we conducted three interviews with two key individuals within our client's organization. The data collected during the interviews revealed a number of information-related issues. Some of these issues that we have found are listed below. To provide you with a better understanding of these problems, we are defining them here by their terms because they will be referenced though out the systems analysis and proposals.

- **Data collection**
  - CAIR-Seattle's database does not have any required data fields and is lacking unique identifiers for the records that they keep. This means that all data is entered in original form and cataloging is inconsistent from person to person. There might be extra, non-required fields in one data set, while another data set might be lacking these fields.

- **Data redundancy**
  - Because of different computer applications and a lack of training on these applications, there is redundant data contained on multiple computers that make up the CAIR-Seattle information system. This redundant data is difficult and time consuming to maintain; any such attempts to maintain information integrity are very difficult.

- **Information access**
  - CAIR-Seattle has multiple sources of information but access to this information is limited by lack of software training and also by physical location. Another user cannot access the information that is stored on a different computer, unless he/she is in possession of that computer. Also, due to the lack of unique identifiers on records, data inaccuracy and inconsistencies can make finding records difficult and time-consuming.

- **Information storage and archiving**
  - All of the current information that CAIR-Seattle uses is stored on two computers. There is no standard archiving practice in place on either of these computers; one user might archive on a regular basis while another might not archive at all. Also, there is no current system in place that would automatically archive the information.

- **Information dissemination**
  - The current way that information is disseminated in CAIR-Seattle is at times very troublesome for the user. Information may be difficult to access and at times the users are not trained in how to access or create the proper listing of information that they need.

- **Information accuracy**
  - Because of redundant data, incompatible file types, and a physical separation of data it is difficult to maintain information accuracy. There is no method in place to cross check for data entry errors and to verify information accuracy.

- **Lack of human resources (all but one staff member works on a volunteer basis)**
  - With only one full time staff member, human resources are very limited. This full time staff member performs a large majority of the work and because of this, some tasks are never completed as time cannot be found to complete them.

- **Lack of standards in data gathering**
  - Information that is collected by CAIR-Seattle is not defined by a proper and unified standard. One member of the organization might gather information in one manner and another member might collect information using a completely different procedure.

- **Inadequate training**
    - CAIR-Seattle is utilizing many pieces of software while their depth of knowledge is not very extensive on some of them. They have limited proficiency on the software, but they realize that the software has much greater unacknowledged potential.

- **Process inefficiencies**
    - Many of the processes that CAIR-Seattle currently employs could be streamlined into fewer steps. Some processes, such as logging of phone calls, currently require more steps than necessary to complete.

- **Lack of a data recovery system**
    - Currently CAIR-Seattle does not have a backup system for much of their organizational critical data. If there was a catastrophic malfunction and all data was lost, there would be no backup system in place to recover the lost data.

Based on our data analysis activities we identified what we feel to be the root causes or problem(s) associated with those issues.

We feel that there were many problems and issues that revolve around the data collection, information storage, and information retrieval within CAIR-Seattle. Many of the above listed issues stem from the direct lack of sufficient human resources (1 full-time staff), process inefficiencies, and a lack of software training.

Of the issues that we found, the Information Systems Analysis Team will be focusing on how CAIR's existing software applications interact and how the information stored in those applications relate.

System Alternatives

- ► **Alternative 1 Summary: Status Quo**
- ► **Alternative 2 Summary: QuickBooks Plan**
- ► **Alternative 3 Summary: Salesforce.com**
- ► **Alternative 4 Summary: NonprofitBooks Office**

Alternative 1 Summary: Status Quo

At the moment, CAIR-Seattle, as a nonprofit organization, is run by four to five people. The organizational hierarchy consists of the board of directors, the manager, and volunteers (see Appendix C for organizational chart). Michaela Corning, as the manager, not only gathers information from the Muslim community in the form of phone calls or e-mails, but also distributes the information to her peers or other volunteers. Much of the information she receives is stored on her laptop or written in a spiral notebook. This section will describe the benefits and costs of keeping the current system.

Organizational Benefits

When looking at CAIR-Seattle's current system within the scope of organizational benefits, it is evident there are benefits to the current system. The way current way business is conducted within the organization is natural for the employee and volunteers. Below is a list of organizational benefits as it relates to their information system:

- **Procedures are concrete**
  - Having set procedures makes it easy for the employee and volunteers to have their tasks better understood. They know what needs to be done and where the information needs to be delivered. There is no guesswork.

- **Minimal need to train on new hardware or software**
  - Since the current system is in place, there is little need for training on the hardware and software that is being used. The only training that takes place is when a new volunteer comes into the organization's information system and needs to be instructed on how things operate on the various levels within the information system. This does not, however, include expanded training on current application software.

- **Users are comfortable with the system**
  - The users are familiar with the current system since they have nothing to compare it against in another nonprofit organization. They know the procedures that need to be accomplished and also how to accomplish them. Those that interact with the system have their set ways of doing tasks in the organization as they were instructed or trained to do.

- **Infrastructure is small**

  - With the current size of the organization being relatively small it is easy to have a small information system infrastructure. This makes it easy to manage and maintain for the current staff of the organization, who understand many of the various aspects of the information system.

Organizational Costs

With the current information system in place there are some costs that are attributed to a few of the problems. These costs can hinder organizational performance and their ability to serve the Islamic-American community in Seattle. The organizational costs that ISAT found are listed below:

- **Minimal information sharing**

  - Because of the nature of the organization, one full time staff and volunteers, the way that information is shared is very poor. If a piece of information was needed and had to be shared within the organization, then multiple people may need to be contacted so that one piece of information could be retrieved. This process can take days and after the information is received, thought needs to be made if it is even useful anymore.

- **Difficult to find information**

  - There are multiple databases, spreadsheets, and other files that contain all of the organizational information. If the user does not know where the file is or if they need to cross reference the information, they have to look in multiple sources within many applications to find the information and all comparisons would need to be made by hand. This is also troublesome since data-entry is not standardized. There are no current required fields for information and therefore all information can be entered in as the user sees fit.

- **Inability to report information back to CAIR National**

  - Due to a lack of training on some of the software packages that are currently being used, the client is unable to report information back to CAIR National at the end of the year.

Financial Benefits

The following financial benefits would arise from the continual use of their current system.

- **No necessary new hardware purchases**
    - Since the organization would already have their current infrastructure in place, it would not be necessary to purchase additional hardware. This is because all of the current hardware that is owned and operated for the use of the organization would continue to be used for their current purposes and replacement hardware would not be needed.

- **Finances can be allocated elsewhere**
    - As stated above, the finances would not necessarily need to be used for the purchasing of new hardware. So, the money saved on proposed upgrades can then be allocated elsewhere within the organization. This could be beneficial to the expansion of the organization.

Financial Costs

The financial costs are based on the fact that maintenance will be needed as well as other preventative costs that will need to be employed to maintain the current information system architecture. The financial costs of maintaining the current system are listed below:

- **Preventative hardware maintenance costs**
    - Since all of the current hardware will continue to be used, there will be costs incurred that will help in maintaining their current infrastructure. These costs can include:
        - Basic computer maintenance
        - Hardware replacement for faulty parts

        These costs will be incurred over time if the current system is kept in place. Newer hardware would not require the amount of upkeep that aging hardware would. These costs could be as small a purchase of a new mouse or as large as a memory or disk space upgrade and will be proportional to the growth of the organization.

- **Application upgrade costs**

    o The QuickBooks software that CAIR-Seattle currently uses to track all of their finances has the option to purchase updated forms annually. These forms include updated figures and changes that have been made to the forms over the past year. These forms would need to be purchased every year when CAIR has to report what their finances are to the government and to the organization's paid staff workers.

Procedural Benefits

In its current state, CAIR-Seattle has four to five people running the services it provides. Michaela Corning is the manager and is the central point for information flow as she is usually the main contact for the Washington state Muslim community. This information is often disseminated to a few others in the organization. Financial information, such as donations, is passed to Rami Al-Kabra the Treasurer or Mohammad Khan the volunteer QuickBooks user. The main benefits of retaining the current system from a procedural perspective are as follows:

- **No retraining of employees or volunteers**

    o Employees and volunteers will not need to be trained at the cost of the organization to learn new software applications or to follow new procedures in data storage methodology and data input approaches.

- **No reassignment of tasks**

    o In maintaining the same system, current employee assigned tasks will remain consistent with the current workload.

Procedural Costs

The main costs to the organization from a procedural standing in maintaining the status quo are as listed below:

- **Time spent reorganizing data inputs**
  - o Since data is being stored in separate formats, the data needs to be combined at a later phase which uses up time to convert the various formats into one Access database to be sent to CAIR National.

- **Time spent resolving data redundancies and inconsistencies**
  - o From our analysis, we have determined that the current data storage and input approaches used by CAIR-Seattle have lead to client data being re-entered in separate databases, or some data storage formats having more updated information than others. Continuing with the current system will allow these problems to persist at the cost of organizational time to fix them.

Alternative 2 Summary: QuickBooks Plan

This alternative recommends the purchase of new hardware and software to provide remote access to data for CAIR-Seattle employees. On the next few pages the alternative will be described and the benefits and costs of purchasing and implementation will be provided.

This alternative involves central storage of data, data accessibility, and group coordination with a concentration on product value and medium term expandability. The concept is to move most data processes into QuickBooks, provide training to users, allow multiple methods of accessing data, and provide a more efficient way to log phone correspondence by using While You Were Out Software (iWYWO). Our recommendations are that CAIR Seattle:

- Import all contact information into QuickBooks and use it as their primary data-tracking program

- Audit information to remove current duplicate/invalid entries

- Train all permanent staff/volunteers in basic/intermediate QuickBooks use and one member in advanced QuickBooks use

- Train at least one member of the staff in using CAIR National's civil rights Access database

- Adopt a standardized set of data entry methods

- Purchase and install a server for accessing and hosting the main QuickBooks file

- Purchase and install a workstation for additional access to the QuickBooks file

- Purchase and install an all-in-one printer/scanner/fax machine to be shared from the server for all onsite and offsite users

- Purchase licenses for and install iWYWO for all permanent staff to track incoming calls and take notes on the calls

- Set up software Virtual Private Network (VPN) connections for offsite workers to access QuickBooks and iWYWO

- Configure QuickBooks to make automatic record backups on CDR/CD-RWs

- Assure that pertinent data in QuickBooks is secured with a password

- Arrange to receive returned check information in QuickBooks format

Organizational Benefits

By implementing this alternative CAIR-Seattle will gain the benefits listed below:

- **Better fit for current organization size**

  o Currently CAIR–Seattle has close to 400 members. This calls for an organized collection of data to be stored in one place to eliminate the redundancy and inconsistency of systems currently in use. Tracking member and donor information in QuickBooks will minimize problems while providing a fast and easy method to retrieve information.

- **Room for future growth in both donor and volunteer base**

  o By implementing this alternative the organization will be able to scale to a larger donor and volunteer base without dramatically increasing their costs.

- **Overall increased productivity using the tools through training**

  o Each user will be provided training on the applications, which will increase productivity and accuracy when performing tasks.

- **Increases donor confidence**

  o Centralized donor information entered into QuickBooks in a standardized method will eliminate duplicate records for the same donor and eliminate errors that might result in incorrect information being sent to the donor.

Organizational Costs

With this alternative there are few organizational costs. We feel the following points will not hurt the organization's performance. However, awareness of these costs will allow recognition of the possibility of them occurring. The organizational costs are as follows:

- **Less interpersonal communication**

  o By using this alternative, less communication may result by eliminating the necessity to physically contact other board members or staff to perform specific tasks.

- **Increased tension**
  - o Changes in procedures will be made and it is often difficult for individuals to deviate away from old work habits, leaving them feeling tense and uneasy about adopting new methods and procedures.

Financial Benefits

The following financial benefits would arise from the use of this alternative:

- **Increased hours dedicated to fundraising**
  - o By using the proposed system there will be less time spent processing member/donor information which may allow that time to be allocated to other important areas such as fundraising.

- **Increased commitment to pledge as CAIR grows**
  - o As members see donations used in a manner that is helpful to the organization and community, there is a greater likelihood that contributions will increase.

- **Cost of upkeep lowered**
  - o Because fewer applications are necessary for this alternative, maintenance and update costs are decreased in the immediate short term.

Financial Costs

There are many financial costs associated with this proposed system that are necessary for this alternative. New equipment will be needed, as well as new software, and training. These costs will need to be taken into account in order to solve the selected problems that were outlined in this systems proposal. The financial costs are listed below:

Software:

QuickBooks:

$1359.16   5 user license upgrade with Ultimate Support Package

Telephone Messaging Software:

$50.00   iWYWO 2 user initial purchase

$30.00   2 additional iWYWO licenses

Computer Equipment:

(See Appendix E for full system details and model numbers)

$88.00   D-Link 8-Port Broadband Router

$130.00   Lexmark Multi-function printer, 19 PPM, 4800 x 1200 DPI

$14.85   3 x 25 Ft, Cat. 6 Patch Cable, With Snag-Free Caps

$852.30   OptiPlex 170L (server configuration)   w/ 3 yr. warranty

$749.70   OptiPlex 170L (workstation configuration) w/ 3 yr. Warranty

$**30.88**   Verbatim Datalife CD-R 50 pack (annual)

Training:

$199.95   Level 2 QuickBooks Seminar-in-a-box Training (Advanced)

Total: $3473.96

Procedural Benefits

There are many procedural benefits in implementing this alternative. They are split into the following categories for easier understanding: data management, communication, and task management. The benefits are listed below and explained in detail.

Data Management

- Streamlined data entry and retrieval
- Prevents most data errors from duplicate entries
- Negates the need to search through multiple sources for contact data
- Allows for remote data access to QuickBooks and iWYWO programs
- Ability to import/export into Microsoft Excel for easy conversion
- Multiple users will be able to view or access lists, reports, member information, and donor information
- Removes the need to deal with paper checks for account balancing

Communication

- Fast and efficient phone log/note taking
- Eliminates paper backlog from incoming calls
- All users can print/scan/fax/copy from the same device

Task Management

- Notes can be sent instantly to their intended recipient
- Notes can be shared to prevent task queues from building up
- Backlog of notes for users can be tracked to keep from swamping any one user
- Diminishes the need for members requesting contact data from each other
- Enables and allows scheduling of automatic back-ups of QuickBooks data
- Rights management, more volunteers can be used to enter lower security data
- 24/7 tech support available for QuickBooks and on site repair from Dell

Procedural Costs

The main costs to the organization from a procedural standing are as listed below:

- **Teaching new standardized procedures**
  - All staff members and volunteers entering data must be taught the standardized methods for data entry, requiring time from both the trainee and the trainer.

- **Installation and configuration of system**
  - It will take a fair amount of time to get the new system into place, detracting from work on fund raising and lobbying.

- **Records auditing**
  - As data is moved to the new QuickBooks based system, duplicate entries and invalid data need to be filtered out, consuming time verifying details of questionable entries.

- **QuickBooks training**
  - o The advanced training course in QuickBooks is a two day long seminar on CD that will take 20+ hours to complete. Additionally, relating basic and intermediate functionality from the advanced QuickBooks user to all staff will require more time.

- **Exporting CAIR National database**
  - o A disadvantage to this alternative is that QuickBooks offers no direct method of exporting data into a Microsoft Access format that would later be integrated into the CAIR National Database.

- **No improvements to paper pledge system**
  - o All pledges must still be read from paper slips and entered by hand into QuickBooks.

Alternative 3 Summary: Salesforce.com

A third alternative would be to consider Salesforce.com. They deliver integrated, completely customizable enterprise applications. Their platform offers developers complete Web services-based customization, integration and extension for customer relationship management services (CRM).

The discussion below will provide examples of Salesforce.com's capabilities. The client needs to understand the costs and benefits of adopting Salesforce.com through three aspects: operational, financial, and procedural. Problems that Salesforce.com might address are limited human and financial resources, lack of clear organizational structure, redundant and inaccurate data.

Choosing to use this application, CAIR-Seattle will be able to review and analyze current sales, marketing and customer service processes, import existing data into Salesforce.com, and receive free online training through the Internet as well as ongoing customer support.

Organizational Benefits

It's important to consider how Salesforce.com will solve our client's information problems given the organizational structure and lack of human resource. From an operational point of view, Salesforce.com would be successful if it is easier to learn, manage, update, maintain, and to train others its uses. Organizational benefits of choosing this alternative are outlined below:

Tangible benefits

- **Increased productivity**
    - o Salesforce.com is promising because it can increase the productivity of CAIR-Seattle's staff members. If they are able to get more work done in less time, the new system can free up more time for the employees to focus on fundraising events and networking with potential sponsors. Paid employees will get more work done for dollars in salary spent.

- **Increased sharing of information**

  o In the current system, information is scattered, redundant, and isolated. Salesforce.com allows multiple groups of users in different parts of operations to share information, even remotely. For instance, the Treasurer or the Accountant can view CAIR-Seattle's members' donation information from the same system as a civil rights coordinator who's viewing members' cases. Salesforce.com provides "integrated, online service to help you manage and share your customer information for your Sales, Support, and Marketing teams."

  This system satisfies our user's needs to view all the available information about a member. One of CAIR-Seattle's most important goals is to be able to upload civil rights cases to the national database. Salesforce.com will enable them to do this because it can customize data fields, import data from the local branch and export data to CAIR National.

- **Additional staff less likely to be required**

  o Given that productivity is increased, CAIR-Seattle may not need to acquire an additional permanent staff member or volunteer to maintain or update the spreadsheets, meeting minute logs, or phone call records. Salesforce.com supports such a wide range of functions that one user is able to manage information efficiently.

- **Assign ownership of tasks**

  o "Using Salesforce.com's built-in workflow engine, you can automatically route cases to the right person or team and escalate cases that are not promptly resolved, allowing you to deliver better service, faster." (Salesforce.com)

Intangible Benefits

- **Increased confidence and staff morale**

  o Currently, the heavy workload and overall poor information collection and management makes it stressful and overwhelming for one employee. Salesforce.com does data accuracy checking so that our employee can feel more confident, productive, and satisfied with the amount of work to meet deadlines.

- **Increased trust**

    o Salesforce.com will help CAIR-Seattle define its organizational structure. Successful adoption of Salesforce.com will strengthen trust from CAIR National for the Seattle chapter. Because of the intuitive and customizable interface of Salesforce.com, volunteers can be trained quickly to use the systems. Board members will also be able to delegate and entrust their staff member(s) with important tasks.

Organizational Costs

Tangible Costs

- **Training Required in use of the new system**

    o CAIR-Seattle will have to pay for employee training to use Salesforce.com. Salesforce.com cannot replace their staff. They still need to pay their current employee to train, manage, update, maintain, and administer Salesforce.com. Although the need for additional staff to enter and manage information is lowered, the need for a technical support admin might arise. There are public training classes that Salesforce.com provides to users, however, those are only accessible to Professional and Team Edition customers. Nevertheless, Salesforce.com provides "multi-channel support", which has a variety of other methods of support services: "No matter how many different touch points your support team relies on — phone, e-mail, Web, or in-person — Salesforce.com delivers. With online case capture, auto-e-mail response, customer self-service, and CTI integration, Salesforce.com provides a truly multi-channel solution." (Salesforce.com)

- **Limited resources**

    o Salesforce.com is a very big product and it may be difficult for a small group with little resources to train and use. In order to narrow the scope of Salesforce.com, it will take time to train and adopt.

Intangible Costs

- **Possible resistance**

    o Adoption of any new technology or method will potentially create resistance from current system's users or stake holders. Current users might be familiar and attached to current methods and have difficulty

changing their conceptualization of how the organization should function.

- **Estrangement of CAIR-Seattle**
  - o Resistance can lead to estrangement between members of the organization who prefer the new methods and those who reject them. The adoption of Salesforce.com might also be unique to the Seattle chapter. That uniqueness can create a gap between this chapter and national as well as other chapters.

Financial Benefits

Important decisions are often made based on financial resources. Because CAIR-Seattle is a nonprofit organization, funding is limited and varies depending on the amount of donations and budget spending. Evaluation is necessary to determine if Salesforce.com can solve their information problem while meeting their financial limitation.

Tangible Benefits

- **Free service**
  - o Salesforce.com is a free online service. "As an on demand service, there is no software or hardware to buy, install, maintain, or upgrade with Salesforce.com. This equates to savings of as much as 90% compared to similar client/server solutions…" (Salesforce.com) A nonprofit version is also available given certain tax information verification.

- **Reduce costs of hardware set up**
  - o Because Salesforce.com is web-based, it can be accessed from multiple places, at anytime from anywhere. This eliminates the need to purchase hardware for a network that would allow storage and management of databases and offsite accessibility.

- **Increase fundraising opportunities**
  - o Increased productivity allows our employee to have more time to focus on fundraising events. Salesforce.com allows user customized views, and the ability to add and manage prospective leads and opportunities.

- **Prevention of expensive loss of data**

    - The current system does not provide methods for data back-up and recovery. With the ability of backups stored online and their availability for download this expensive risk is massively reduced.

Intangible benefits

- **Increased confidence from sponsors**

    - The successful adoption of Salesforce.com will increase confidence from their sponsors because the adaptation of the new technology may show how their donations are being used wisely in the best interests of the organization.

Financial Costs

Tangible costs

- **Switching cost**

    - It will cost money to pay employee(s) for the time that they train to use the new system. Again, because the scope of Salesforce.com is large, it will take around three work days for users to become familiar with this service, and narrow the scope of the product to what CAIR-Seattle needs. Once CAIR-Seattle's employees are familiar with this service, these individuals can train other individuals. Estimated switching cost is as follows:

        $15/hr x 8hr/day x 3 days = $360 per employee

- **Potential misdirection of financial resource**

    - If Salesforce.com's adoption is unsuccessful, money that went to the training of its adoption is lost.

- **Costs of package type**

    - The cost of the service is something the needs to be weighed when compared to other vital aspects within the organization.

Intangible costs

- **Loss of image**
    - o Donation money will be used to invest in the adoption of Salesforce.com (e.g. training employee). After the adoption of Salesforce.com, if old problems remain and perhaps new problems arise, CAIR-Seattle is at risk of a degradation of their image to the community that they respectively serve.

Procedural Benefits

For the implementation of Salesforce.com to be successful, it must support the current and near future tasks and procedures that CAIR-Seattle performs. Salesforce.com would be worthwhile to adopt if it can implement, possibly reduce the workload, and fulfill the majority of the goals and objectives of the organization.

Tangible benefits

- **Reduces tasks and procedures**
    - o At the moment, CAIR-Seattle is overwhelmed with data collection and data management. For tasks such as phone call loggings and communication with civil rights claimants, the current system requires our user to record the same data multiple times on paper and re-entering it to the computer when time permits. Because of inaccurate data entry, difficulty to find information, redundant data, and so on, this creates extra tasks and procedures that CAIR-Seattle will benefit to forego. Salesforce.com will allow them to perform necessary tasks more efficiently so that extra steps are not necessary.

- **Allows remote activities**
    - o CAIR-Seattle depends on the various commitment levels of their volunteers. Most volunteers have full time positions outside of CAIR. Salesforce.com will allow more tasks to be done remotely anytime which benefits the volunteers the most as their time is limited to serving the organization.

- **Enhances goals and objectives**
  - o Table 1 below explains how adopting Salesforce.com will enable CAIR-Seattle to not only improve their current tasks, but also enhance other services to the community. It is also important to emphasize what tasks Salesforce.com will enable them to do while moving towards achieving the ultimate goal of providing important services to the community.

Table 1. Comparison of Tasks and Available Features of Saliesforce.com

Current Tasks/Procedures	Tasks/Procedures our user envisions	Salesforce.com
Keep track of civil rights violations cases		YES
Watch media		YES
Contact community members		YES
Contact claimants/victims		YES
Fundraising		YES
	Membership drive	YES
	Contacts categorization	YES
	Biweekly press releases	YES
Phone call logs on paper	Phone call logs on computer	YES
Meeting minutes logs		YES
	Submit database to national	YES
Contact ACLU, EEOC, Hate Free Zone		YES
Accounting related		YES
	Categorize donors/ donor profiling	YES
	Categorize members	YES
Data entry of donations		YES
Civics education		YES
Voter registration record keeping and assisting		YES
	Manage time	YES
	View, post, remove meetings and events calendar using the web	YES
	Assurance of data accuracy and currency (donation, address changes, etc)	YES
Link documents from database		

Derive reports of how quickly response to cases		YES
Track what and when cases close, open, pending duration		YES
Generate and send out donation receipts for tax-exemption form.		MAYBE
	Create clear owner of tasks and projects	YES
	upload to National's database	MAYBE
ACH, PayPal		MAYBE
Keep track of multiple contacts information spreadsheets		CAN
Media relation		MAYBE
Conference calls with board members		MAYBE
	Complete information of a person on one spreadsheet	YES
	Something that interface with Outlook	YES
	Track e-mails, letters, faxes	YES

Intangible benefits

- **Data consistency and concurrency**
  - Increased consistency and concurrency of data accessed for certain procedures like viewing calendars and accounts. Tasks made simpler by the help of Salesforce.com's wizards.

Procedural Costs

Tangible costs

- **Addition of more procedures**
  - If CAIR-Seattle adopts Salesforce.com, they will need to also adopt management and support procedures for this technology. Salesforce.com has support and training resources available to help this process of creating these procedures

Intangible costs

- **Increase task complexity**

    o Tasks can be made more complicated for the user because of the technicality of the system. Although Salesforce.com strives to accommodate its users by integrating different technologies and providing a customizable interface, adopting the technology will change the way the user performs their tasks. If not careful, task requirements, and assignments will become undefined.

Alternative 4 Summary: NonprofitBooks Office

Summary

The basis of this proposed solution is the utilization of the NonprofitBooks Office (NBO) accounting, donor management, and impact measurement software suite. The package itself is built upon QuickBooks and provides tools and an interface specific to the management of a nonprofit organization such as CAIR-Seattle. The tight integration between the accounting, donor management, and impact metrics components is what makes this package special. In addition to the NBO package, a network infrastructure must be created to secure the data and support remote access by users at home. This is done using a VPN/Firewall network appliance.

Software and Hardware Purchasing

There are three primary needs in the area of purchasing: network infrastructure, workstations, and software. The chart below (Figure 1) contains a list of the needed items, quantities necessary, and the estimated prices before tax and shipping.

The D-Link VPN/Router is the actual firewall hardware that is placed between the local area network (LAN) at the CAIR office and the Internet. This device allows remote users to use the Point to Point Transport Protocol (PPTP) VPN client that is built-in to most versions of Microsoft Windows. Two network cables are purchased to connect the new hardware together. The existing computer workstations would also connect to this firewall device. Additionally, writable compact disks are needed for data back-up.

While a version of QuickBooks is already owned by the organization, it is not officially supported by NBO. To ensure reliability, QuickBooks Pro 2004 must be purchased.

A new computer is needed to act as a server for donor and accounting data. This will both act as a server and workstation for volunteers and managers using the software package. The recommended system is a mid-range workstation and should include CD writing capabilities for backing up data.

The current Internet access at the office may not be sufficient. Because remote users will need access to data stored at the office, up-stream speed is important (the speed at which

data uploads from the site).   Normal consumer Internet connections have capped upload speeds in favor of faster download speeds.

The third section lists the necessary components to the NonprofitBooks Office application. These components are comprised of the software, 5 user licenses (total), a suite of training CD's, and a year of technical support with free software upgrades.

Vendor	Description	Unit	Qty	Total*
Newegg.com	D-Link VPN/Router DI-808HV	$88.00	1	$88.00
Insight.com	Verbatim DataLifePlus CD-R 50 pack	$30.88	1	$30.88
Insight.com	10 ft Cat 5 E ethernet patch cable	$3.35	2	$6.70
Intuit	QuickBooks Pro 2004 Upgrade	$199.00	1	$199.00
Dell	Dell Optiplex 170L (Appendix G, Server configuration)	$852.30	1	$852.30
Qwest	Qwest DSL Pro 640 Kbps DSL Setup**	$99.00	1	$99.00
NonprofitBooks	NonprofitBooks Office v3.0 3 User	$1,299.00	1	$1,299.00
NonprofitBooks	NonprofitBooks Office Additional User License	$199.00	2	$398.00
NonprofitBooks	NonprofitBooks Office Training CD's	$699.00	1	$699.00
NonprofitBooks	1 Year Premiere Support for NonprofitBooks Office	$299.00	1	$299.00
* Prices do not include taxes or shipping.			Total:	$3,970.88
** Need for DSL depends on current service				

Figure 1: Table of system costs

Installation Steps

1. Purchase VPN/Firewall appliance and VPN user licenses
2. Purchase NBO and user licenses
3. Purchase new computers
4. Purchase network interface cards and wiring
5. Install VPN/Firewall appliance and VPN user licenses

6. Install and configure local area network

7. Install NBO on primary host computer

8. Configure NBO with CAIR specific settings.

9. Create shared folder on primary host.

10. Migrate data from current files and QuickBooks

11. Install NBO on other office computers and configure to use primary host

12. Train users use of NBO software

13. Install remote VPN clients

14. Establish mapped drive to primary host

15. Install NBO on remote clients

System Layout

The following diagram shows how a final system would look. Copies of NBO should be installed on all workstations that need access to the NBO donor database. QuickBooks is needed on any computer that will perform accounting tasks.

**Future Growth and
Expansion**
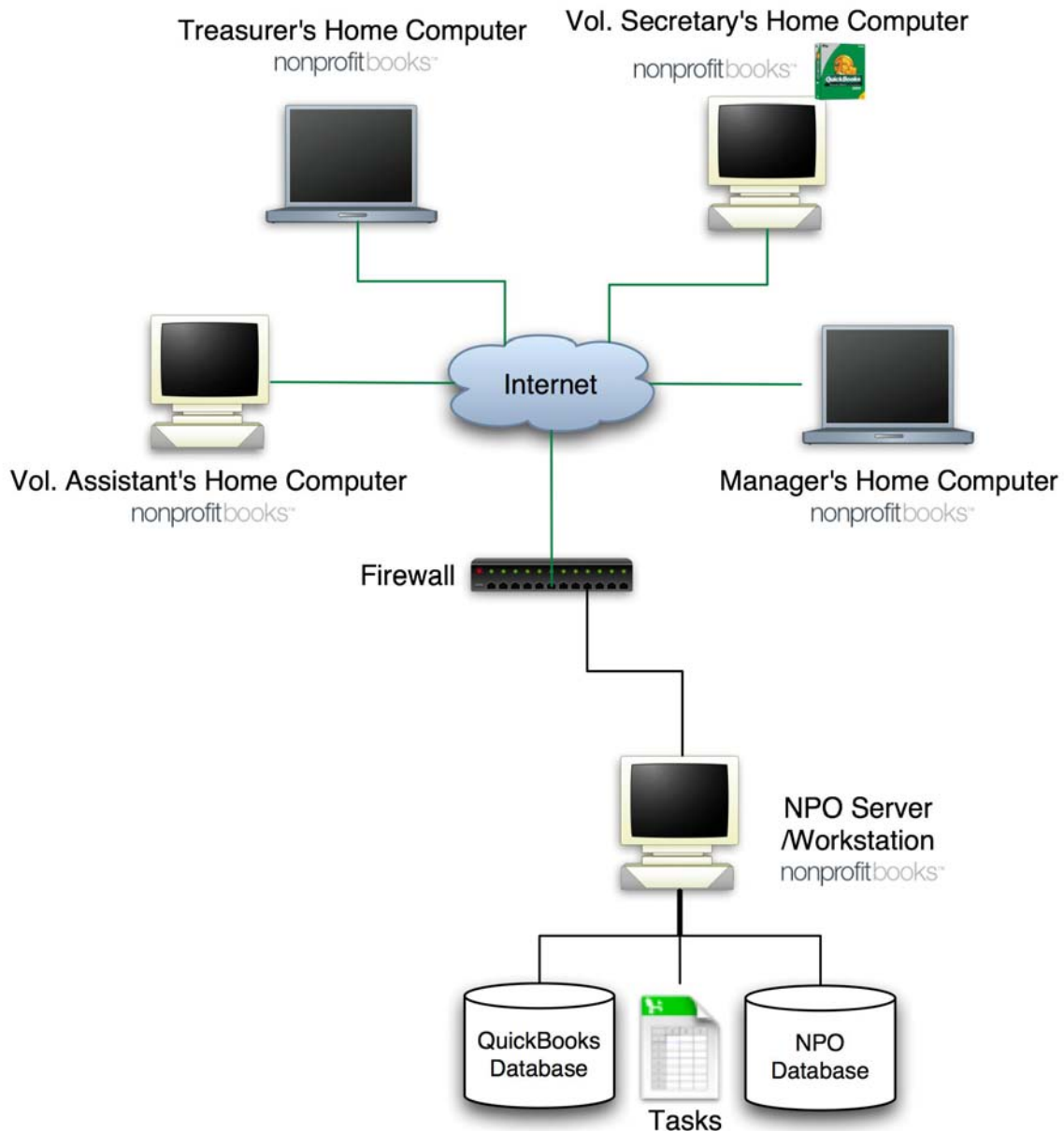
The Watchguard Firewall can be expanded in two manners: by purchasing new VPN user licenses and adding a network switch. New user licenses, if necessary, would allow more users to connect to the system remotely. A network switch allows more computers to be connected to the LAN and therefore given access to the Internet.

Additionally, user licenses for NonprofitBooks Office may be purchased to install more copies of the application on additional computers. Furthermore, the premiere support should

be maintained year-over-year to take advantage of free upgrades. The cost of maintaining the support contract is less than purchasing an entirely new copy of the software when new versions are introduced.

Operational

General Information

- Donor information and accounting information can be secured separately, allowing volunteers to enter donor information without access to financial data

- System uses a primary host to store data and other networked computers remotely access the same data.

- VPN/Firewall keeps local area network secure while allowing CAIR representatives to work remotely.

- Installation of QuickBooks is only necessary on clients processing accounting information.

- Examples of information exports and reporting may be found on the web at http://www.nonprofitbooks.com/

Donor Management

- Donor membership includes the management of all donor, member, business contact, and media contact information.

- The NBO donor management allows various categories of contacts to be specified. In the original configuration, categories should be designated for media contact, business prospects, local members, and members.

- Additionally, custom fields should be designated for mosque and CAIR National membership status.

- The following actions that volunteers and managers will perform with this component of the software package include, but are not limited to the following:
    - Enter donations and pledges
    - Record call logs
    - Record important dates associated with donor records
    - Add new members, contacts, and business targets
    - Generate fundraising, donation, and membership reports
    - Generate mailing lists and mail merges

Accounting

Accounting, handled by the treasurer and any other persons responsible for accounting will be entered and derived directly from QuickBooks and the NBO accounting software. The NBO accounting software closely integrates with QuickBooks, allowing the organization to leverage the powerful donor management capabilities of the Office package and the financial capabilities of QuickBooks.

Actions performed by accounting staff in QuickBooks and NBO:

- Generate financial reports
- Post donation and pledges to accounting ledger (single-click transfer from donor database)
- Donation receipt printing
- Generate FASB-compliant, IRS Form 990 and Unified Chart of Accounts reports

Impact Measurement

This application allows for detailed analysis of donations and pledges. It is a tool that will be used by managers to better target fundraising efforts and therefore increase funding.

Actions performed by management:

- Generate performance reporting charts

Advantages

- Nonprofit specific design of software suite requires little initial customization beyond CAIR specific requirements.
- Unified, central donor databases which would reduce the propagation of errors and the maintenance labor by unifying data into one repository.
- Multiple persons may input donation and pledge information at the same time, dramatically speeding data entry.
  - o For example, a team of volunteers could enter donations after a fundraiser rather than burdening a single person.
- Self-explanatory, task-specific interface lets new volunteers use the system with little training.

- Training CD's covering all components provide a hands-on resource for training new users without paying for classes or requiring excessive amounts of one-on-one training by staff.

- Accounting features offer the ability to handle any nonprofit specific funding management requirement as new sources are acquired and accounting needs evolve.

- Out-of-box reporting features designed specifically for nonprofits
  - o Donation summaries
  - o Fundraising reports

Disadvantages

- NBO does not include specialized electronic forms for civil rights complaints reporting.

- NBO does not provide automated system for task management.

- Requires installation of NBO on client computers.

- Requires installation of VPN client on remote systems.

- Requires regular maintenance in the form of data back-ups.

Procedural

Contact Management

All contacts should be entered directly into the NBO database using the record categories initially specified.

When lists of members are received from CAIR National the database should be searched for the national member:

- If the person **exists** in the database, this status change should be made to the existing record.

- If the person **does not exist** in the database, the record should be created.

Call Logs

Each contact record has a notes feature as part of the software package. Anytime a call is received from the contact, a record should be entered into NBO with all pertinent information.

Civil Rights Reporting

Civil rights cases should be entered directly into the database provided by CAIR National. If it is inconvenient or inoperable, a form should be filled out. As part of regular scheduled maintenance, forms should be recorded entered into the database.

Donation Accounting

- Donations should be entered weekly into the database by managers and volunteers.
- Posting of donations to the accounting system shall be done regularly by the volunteer secretary.

System Maintenance

- Weekly Tasks
  - QuickBooks and NBO database back-ups
  - Task spreadsheet back-ups and clean-up
  - Donation entry
  - CAIR National database downloads
  - Civil rights case reporting data entry
- Annual
  - Premiere support purchase
  - Back-up media purchase

Task Management

The task management requirements of the organization are limited. Tracking tasks an Excel spreadsheet may be used since such a spreadsheet would be created with the following columns:

- Creator
- Assigned To
- Donor or Contact Name
- Status

This spreadsheet should be stored on the host computer and protected for sharing between multiple computers. Whenever a task is created, the task should be added to this spreadsheet and a notification e-mail should be sent to the person the task is assigned to.

The status of tasks should be updated as progress is made and when the task is completed the record should be archived in a separate, identically formatted spreadsheet.

All notes and actions taken regarding tasks should be entered into the NBO database.

Accounting

- It should be requested that all checks from donors include a phone number written on the check. This facilitates finding donor records in the database and thus faster entry of checks into the database.

- Paypal contributions should be tied to the same e-mail address entered into the NBO database.

- Electronic funds transfers will be recorded as pledges in donor management.

- Training CD's should be used to ensure correct configuration and use of accounting package.

Disadvantages

- Task management not integrated with contacts and notes.

- Does not provide electronic means for archiving

- Requires regular maintenance; time requirements may fluctuate depending on quantities of donations and other data entry necessary.

Financial

Benefits

- Faster and more efficient handling of donation and pledge payments.

- Increased fundraising due to better communication with potential donors.

- Increased efficiency and increased ability to utilize volunteer participation reduces the need for increased paid labor.

Costs

- As previously seen, the initial cost of installation of this alternative is estimated to be $3970.88.

- Recurring costs are estimated in the following table:

Description	Monthly Cost	Annualized
DSL Internet Connection	$50.00	$600.00
CD-R 50 pack*	$2.91	$34.88
640 Kbps DSL	$66.00	$792.00
1 Year NonprofitBooks Office Premiere Support*	$24.92	$299.00
	$143.82	$1,725.88
*First year accounted for in initial costs		

Figure 3

System Recommendation

► **Final Recommendation**

► **Outline of Benefits**

► **Summary of Costs and Benefits**

Final Recommendation

From our analysis of the current system and alternatives available, the Information System Analysis Team has concluded that the benefits from pursuing alternative number two (QuickBooks plan) would be the most beneficial and cost effective method for addressing the information problems and needs of the Seattle Chapter of the Council on American-Islamic Relations (CAIR-Seattle). CAIR-Seattle's current knowledge and use of the existing software will ease the transition process necessary to adapt to this recommended solution. Phone messaging software (iWhileYouWereOut) is also included in this alternative and provides an easy way to track phone correspondence. The suggested methodology for implementing this system is included in Appendix F.

Outline of Benefits

This recommendation addresses how software applications interact and how the information stored in those applications relate as was outlined in the problem statement earlier in this system proposal. We intended to focus on a QuickBooks centered design, with the adaptation of iWYWO for phone call logging, remote access for users, providing training, and adopting a set of standards for data entry.

With a design centered on QuickBooks many of the addressed problems will be fixed. Since all information is now stored in a central location access to this information is made readily available to all users with the proper permissions. This gives the users the opportunity to create reports, add and edit data, or view the data at any time they please from any location they choose. Another added benefit of a QuickBooks centered design is the availability of a central server to store all of necessary information. This will ease backup and archiving, which can be setup to start automatically, as well as data redundancy since all data is stored in the central QuickBooks database.

By adopting iWYWO (While You Were Out) phone logging and tracking software problems associated with the current phone call logging system outlined in the analysis of this proposal will be resolved. All calls that come into the organization can now be received

by any user that is connected to the software. All correspondence is then stored on the software and can be reviewed by any member at their convenience. Also, by implementing this software the past inefficient way of logging phone calls with a notebook will be removed. The notes from phone calls will move from the spiral notebook that was viewed by one member of the organization to a central server that can be viewed by any member or volunteer that has access.

Moving from a two computer system to an infrastructure that contains one central server the possibility for remote access is now available. Remote access will allow users to connect to the system from any place at any time. This will benefit the volunteers since they help the organization on a very limited time basis. This access will help them utilize their time that they allocate to the organization better since the availability of access has increased. Also, by allowing the users to connect remotely all of the data that they use for organizational purposes can be stored on the central server for security and safe harbor. But, the main benefit of remote access is how the users can use the data. It will no longer be necessary for a user to contact another member of the organization to receive a report. All the user needs to do now is log into the server and they can generate the report in real time in the manner that they see fit.

In our analysis it was noted the users knew that their software applications were powerful, but that they were unable to completely harness the power that each application contained. By providing training to the users, their proficiency in these applications will increase as will their comfort level in using them. By increasing the comfort level of the user, processes that were not completed before will be seen as less daunting and will be completed. An example of this is the updating and submission of the CAIR National civil rights Access database. In addition to efficiency and comfort with the software, data collection practices will be implemented that will unify the way that data is input. This will reduce data redundancy while increasing the accuracy of the information that is contained in the data sources.

As was previously mentioned, adopting a set of standard data entry procedures will reduce data redundancy while increasing data accuracy. This also addresses the lack of standards that are in place currently. By implementing basic data entry standards across the organization a guide can be set for how data is input into the data sources. Users will now be

able to know what types of information is needed since required fields will be defined before the data is collected. A byproduct of applying data entry standards is that will know what specific practices to follow when a situation arises when inputting data (e.g. entering Ave or AVE as an abbreviation for Avenue).

Summary of Costs and Benefits

Financial Costs

Initial Costs

Software		$1,439.16
Hardware		$1,834.85
Training		$199.85
	Total:	$3,473.86

Recurring Costs	Monthly	Annual
Backup Media	$2.57	$30.88
Total:	$2.57	$30.88

Figure 1: The financial costs of implementing the recommendation

The costs outlined above are split into two categories: initial costs and recurring costs. The initial costs include the software purchases, hardware purchases, and the in-the-box training for the system. The total for these initial costs is $3,473.86. The recurring costs only contain the backup media that will be used to maintain the data archives from QuickBooks. These can be purchased monthly, or can be purchased for an entire year. The annual cost of the backup media is $30.88. For a more detailed breakdown of the costs see Appendix E.

Financial Benefits

With centralized data storage and access, more time will become free to spend on tasks that are vital to the organization's success. One such task, the soliciting of donations, can be put back to the forefront of the organization. Also, when members see how the system is benefiting the organization, the likelihood of increased donations from current members and the addition of new donating members is probable. Along with the increased time to

focus on donations, the costs of maintaining the system are lowered due to the central storage and access of data. Only QuickBooks needs to be kept up to date every year and this will reduce the costs of having to update multiple copies of the same application on multiple computers.

Organizational Costs

Because central data storage and access is the focus of this recommendation there is the probability of less interpersonal communication between board members and staff. All the information that the staff and board members need will now be accessible at any time without having to use a middle man. This will massively reduce the communication between staff on a regular basis. Because of the change from a well-known piece of software to a foreign one tensions might arise. The rising tensions can be associated with difficulty using the new system down to personal preference for the old system.

Organizational Benefits

With the organization being relatively small in size this solution better suits their needs. This solution has the ability to grow with the organization and was one of the main reasons for its recommendation. The organization can purchase additional licenses and computers as necessary. This also benefits the organization as they are now able to store large donor and volunteer databases on their server. The volunteers and members that serve the organization will now have increased productivity from the training that is included in this solution. This training can be provided to one person and then the trained volunteer/member can train others who require similar training. But, the overall encompassing idea is that donor confidence will rise. The donors will see how their donations are helping the organization and their confidence in the organization and what it does will increase.

Procedural Costs

Because the system is new to the organization costs will be incurred so that the system can be put into place properly. Teaching the new standardized procedures to all users

will take time away from their current tasks as staff and volunteers. However, this step is crucial to the successful implementation of the entire system. Also, time spent to install and configure the system will be a cost that cannot be avoided.

Once the system is in place all of the current records will need to be audited. This task is not only tedious, but also time consuming and vital since the current data set contains redundant and inaccurate data. After the auditing process is complete, the training on QuickBooks will take time away from procedures that would otherwise be completed during the time taken for training.

Possibly the largest cost is that there is no direct method to export the data into the CAIR National civil rights Access database. This process would need to be completed as it is preformed now. There would be no improvement on the input of data into this database. Lastly, there is no improvement on the pledging system. All pledges are still taken on paper and processed by hand. No automation or electronic aspect was proposed to move towards a paperless pledging system.

Procedural Benefits

Data Management

With a central server in place, data entry and retrieval is streamlined into one location. By having this central location and by also implementing data entry standards, fewer errors will be entered and redundant data will decrease. Also, having all of the contact data stored in one location will allow the users to know exactly where the information is that they are looking for. They will forego having to look through multiple databases and information sources to find the needed data.

Having a server located in the main office with access to the internet it is now possible to obtain remote access to the QuickBooks and iWYWO programs while offsite. This offers a great advantage to the user as they can now access reports, member data, and donor information whenever it is needed.

Since the organization has maintained Excel spreadsheets in their current system the availability of this as an option was important. With QuickBooks the ability to import and export Excel data is seamless and provides for easy conversion.

Communication

After implementing iWYWO the process of phone correspondence logging and note taking will be expedited. This will eliminate the need for the spiral notebook that is currently being used to maintain phone correspondence. Since this software is stored on the central server all users are able to use the software to check if incoming calls have be passed along to them for further review.

With the purchase of a new print/scan/fax/copy device users will be able to send transmissions to the office via fax, they can print a report at the office for others to review, and copies can be made of needed materials. This will increase the flow of data transfer and communication between all staff and volunteers that work for the organization.

Task Management

One of the main advantages of iWYWO is its ability to handle task management. Notes are instantly associated to the intended recipient and if that recipient is backlogged with prior tasks another user can be delegated the task. This prevents building up a backlog on one user when other users may have few tasks assigned to them.

With the implementation of QuickBooks, automatic backups can be maintained. This allows for seamless backups and archiving of critical data. There is also the ability to allow and access to volunteers to input less sensitive data into QuickBooks via the account privileges that are built in. This is important because the scope of possible help can be expanded since more sensitive data can be blocked off to specific users.

Lastly, if there is a problem with the software or hardware support is a phone call away. QuickBooks comes with a 24/7 live tech support for their software package and online support is also available. Also, from Dell, there is onsite repair for the computer systems that are recommended. This will place the support burden on the manufacturer and not the end user.

Proposal Summary

- ► **Study Overview**

- ► **Outline of Results**

- ► **Alternatives**

- ► **Recommendation**

Study Overview

This study involves learning CAIR-Seattle's information problems through users' interviews, survey and other secondary sources in order to propose several alternatives, and to recommend the best solution to solve their information problems.

Outline of Results

The data collected provides evidence that there are problems with information collection, management, and accessibility issues at CAIR-Seattle. The lack of manpower and inadequate training on current software systems also prevent our users from completing tasks effectively. ISAT will provide a solution for these problems by addressing how application software and its information collaborate with other software applications, how this information is stored, and lastly how this information will be archived for emergency recovery purposes.

Alternatives

Based on the users' information problems, ISAT proposed four possible alternatives: Status Quo, QuickBooks, Salesforce.com, and NonprofitBooks Office. Each alternative was evaluated through organizational, financial, and procedural costs/benefits analysis of how well it addresses the information problems at CAIR-Seattle.

Recommendation

We chose to recommend a solution that allows the users to expand their expertise and productivity using QuickBooks. Since our users are already using this software, our solution allows the users to make an easy transition to the new system. The implementation phases that we propose include a one time cost of approximately $3,500 for the initial purchases of new hardware and software; however the cost of switching is much lower compare to other alternatives. As an outcome, we hope to help the Seattle chapter meet the goals and objectives of CAIR and enhance the overall quality of services to its community.

Appendices

- ▶ **Appendix A: Data Collection Instruments and Interview Transcriptions**
- ▶ **Appendix B: Feasibility Study**
- ▶ **Appendix C: Organizational Chart**
- ▶ **Appendix D: Data Flow Diagram**
- ▶ **Appendix E: Additional Information About Systems Alternatives**
- ▶ **Appendix F: Suggested Methodology**

First Interview of the Council of American-Islamic Relations Manager

Interviewee: Michaela Corning (Manager)
Interviewers: Laila Almounaier, Tina Norman, D.T. Tran

Miscellaneous: Interview was record with permission of interviewee under the premise that it would be used for academic and note taking purposes only. This will be the first interview of Michaela. The interview was preformed in a coffee shop. This is the third revision of this data collection instrument. The questions below are presented as they were asked during the interview. A copy of the transcript follows the question outline. Open ended questions were asked during this interview since this was the first person to person contact with a member of this organization.

Goals

o   Find out what exactly Michaela's role is within the organization.

o   Get a picture of their information system, from Michaela's perspective.

o   Get a picture of the organization's structure from Michaela's perspective.

o   Ask what Michaela what she would like to see as her information system in the future.

o   Figure out what tools are used and for each specific task she performs.

o   Find out how information is gathered, stored, and accessed.

o   Find out what symptoms Michaela perceives as cropping up.

o   Find out information regarding financial resources, human resources, and current equipment.

o   Get a sampling of the current data they keep.

o   Find out what some of their current information related problems are.

o   Find out how much time is spent on daily tasks.

o   Ask how she communicates with others within the organization.

Questions

Introductory Questions
1.   What is the title of your position with CAIR?

2.   How long have you been in this position?

3. What are your roles and duties for this position?

4. Can you explain to me what your tasks or activities are on a given day?

Questions about Tools Used and Tasks

5. Are there forms, systems, or tools you use to perform your daily tasks?

6. Are there tasks that you perform on a scheduled basis? (For example weekly, biweekly, monthly, quarterly, yearly?)

7. If yes, what are those tasks?

8. If yes, what are the tools, systems, or forms you use to perform those tasks?

9. Can we see how some of these tasks are preformed?

Questions about Information Gathering, Storing, and Access

10. How is the information collected/gathered?

11. How is this information stored?

Questions about Time Allocation, Communication, and Improvements

12. How is your time allocated on a weekly basis?

13. What are the most challenging aspects of your job? Why?

14. If you would like to change or improve one thing about your job what would it be?

15. How do you communicate with the volunteers?

16. How do you communicate with other employees or board members?

17. Where is this contact information stored?

Questions about Organizational Structure

18. How are decisions made in the organization?

19. What relationship do you have with the national organization?

Questions about Information Related Problems

20. What kind of information-related problems do you run into?

21. What kind of information needs to be kept?

22. How and where is information currently stored?

23. Of this information that you are currently tracking, is there other information that you would like to track, but are not doing so at the moment?

24. Of the information that you collect, how do you use it?

25. If I was a client on the phone, what types of information would you need from me?

26. What are some common data collection errors made?

27. Of those errors which is the single most troublesome?

28. How many times a week/day is the database updated?

Question about Information System Future

29. What would like your information system to do?

Transcript of First Interview with Michaela

Introductory Questions

ISAT: *What is the title of your position with CAIR?*
Michaela: Manager

ISAT: *How long have you been in this position*?
Michaela: 6 months

What are your roles and duties for this position?
Michaela: Driving, sometimes coordinating certain activities. It completely depends on the level of commitment from the other board members. The activities specifically are administration, operation, membership drive, initiatives that CAIR as a whole perform: voter registration, civil rights activism, advocacy in term of civic education. And those are just a few.

Task Oriented Questions

ISAT: *Can you explain to me what your tasks or activities are on a given day?*
Michaela: It really depends on what's coming on the horizon. (Cell phone interrupted the conversation.) For example, right now it's the fundraiser. So everything that's driving my activities right now is to meet the deadline on May 8. But as always, there are interruptions like people calling or people calling to complain about civil rights violations. That's pretty much my daily activities: whatever's driving the activity and then interruptions of people calling.
ISAT: *So do you handle all calls?*
Michaela: Yup!

ISAT: *And you take care of their requests and needs?*
Michaela: Yeah, or pass it on. It really depends on what it is.

ISAT: *Who do you pass them off to?*
Michaela: It depends if somebody is calling for a specific person. Like if people are calling for Samia, I can probably take it. But because I'm so overwhelmed with the stuff that I'm dealing with that I pass it on. It really depends on my workload too. I mean if I get something that I can hammer out right then and take care of it, then I will. If it's going to take investigation, I'm going to see if it's worth it for me to shelf it for awhile or I'll say 'You know what, somebody else needs to take care of it'.

ISAT: *Who's Samia?*
Michaela: Samia is our Vice Chair. I brought her up because she's also our media chairman, or chairwoman, whatever you want to say. A lot of the press releases that go out have her name on them specifically. She has all of these legal experiences, and she's also poise and an articulate speaker. So I'd like to hand it off to her because I'd hate to say something, even though I feel like I'm pretty good, you just never know. They say things to trick you, to get you stuck. It's almost like getting stuck is worse than saying things that aren't entirely accurate. So you know what Samia's phone number is (xyz), or Samia is not in town right now, here's her e-mail address, please send her an e-mail

ISAT: *Is she an employee?*
Michaela: She's a volunteer. Everything that's working with CAIR right now is either volunteers or members, and I'll have them do little projects here and there, or on the board of directors. So people that I work with daily are usually the board members; like Rami is a board member and Samia is. I actually report directly to the chairman, who's Ibrahim, and sort of secondary to the other board members; it kind of depends on what's going on.

ISAT: *Do you delegate tasks to the volunteers?*
Michaela: (Laugh) Yeah, I'm sure the board members do. We're just sort of like… in these weird positions.

ISAT: *So do you run the show?*
Michaela: Kind of, yeah, daily. But in term of approvals and things like that, the board members get involve, like when it comes to milestone things, they approve things. But yeah, if you want to say that I run the show, I guess so. Because I'm the one working 24/7…so...

Phone Correspondence Questions

ISAT: *You said something about people calling in, for media responses for example, how is that handled? Do you enter their information, or do you jot it down on a piece of paper?*
Michaela: I'm jotting it down on a piece of paper. And that's actually something that's on my list, of what I'll have to do, is that I want to create a message log. Something that I can easily go into; nothing that has to get up and running like Access database (they usually take a few seconds) and that's not really time appropriate if you're talking to somebody on the phone and ask them to hold on. And I don't really want to transfer things to my computer. But I'd like to have message logs to track phone calls of…

ISAT: *Call time and stuff like that?*

Michaela: I don't know about as much as call time, but I'd like to keep track of who's calling and what day, and what they're calling about. I think that that would be a really good thing to have archived, because you can go back and say…well, I can keep track of these calls…For example there're tons of people in the community who called to ask questions. So I call and call, and the phone is busy… Or they don't call me back…may be it's because they don't know who I am. I don't know… whatever it is, may be they expect that someone else was going to call? I don't know what the deal is, but I don't have time to continually calling them. So I figure if it's important, they'll call back. Or they'll give me an alternate phone numbers or something. But I'd like something that tracks who's calling instead of me writing that down in my notebook, but I fill up these suckers really quickly. I'll go back and I'll highlight things that are important that I need to take care of it. Or I'll put a check if I have taken care of it. But I'd like to create something… I don't want it to be a spreadsheet, that's just too archaic, and …

ISAT: *It sounds like it would be nice if you can also create something that…if it's for someone else, you can write it up at the same time and pass it off to the right person.*
Michaela: Yeah, exactly, so there would be a loop and I can follow up on it. The core of our organization is providing a service to a specific community and that's the Muslim community. And if you're not keeping track of those kinds of calls, then it's a disservice. So…I did some technical support stuff when I worked at TelCom when I very first starting out from college. We had a database and it was very horrible, but we had to keep track of tons of calls everyday…I don't want to get that detail like doc every phone call, but at least I'd like to see… And it's good to generate reports too so I can tell the board well I get so many calls a day and why I'm justifying that we need an admin assistant because I can't be that person...Anyway…

Tools to Assist Daily Tasks Questions

ISAT: *Are there forms/system, tools you use to perform your daily tasks? Other than jotting things down on a piece of paper (Wait for response, Can we take a look?)*
Michaela: Well that was just in term of messages. We have right now the "Civil Rights database" and I believe it's Access. I have actually…since I started, I got this from our national office…and…umm (chuckle)…it's something where I don't want to say that a database that's tracking technical support and civil rights violations is similar. You don't just go in there and start working at it. You need to really know what you're doing. Because you don't want to mess up the system, the accuracy is important but even if there's something changed, you always want to keep the old record. For example, if there's a change of address, we keep the old address so that we know that they have a change of address. I have not have time to sit down and read and figure out what other stuff that we're supposed to do.

ISAT: *Can you give us an example of why you'd use this database?*
Michaela: Because when you're tracking civil rights cases, it's very very important, from one, a legal stand point, because when you're providing a service to a community and if you're making a mistake, you don't want them to hold you liable. Or if they think that you made a mistake you don't want them to hold you liable for some reason. And also because every case is different, some just requires very little follow up (like writing a letter to the

employer to inform them of Islamic duties or religious practices. Some takes the involvement of the ACLU, EEOC (which is a government employment/government agency that tracks discrimination and things like that). When it involves some organization, then it becomes more complex: who has to do this, and we have a deadline that we'd have to complete and things like that. Or I would need to talk to this person, etc…There're so many things to track so a database is really important to us. If it's the "rights" database, you can put in documents that you've sent, you can link word documents, excel spreadsheets, you can link e-mails, instead of having them in your Outlook, you can put it in the database. So it creates like a really good way of tracking of what's happening in the progress. From that, you can derive reports so you can get an idea of how quickly you're responding to cases and how quickly they're closing, how many opens...CAIR National now, our research directory (I forgot his name but he's always on TV) he puts together every two year a report that shows, for example after September 11, national is getting 300/200 cases a month or something like that and then they were getting a thousand cases of discrimination cases. It just shots up. So it's important to be able to tell those changes, not only for the organization, but also if somebody want to apply for grant or something, they can say that 'See this is why we need money to hire this many civil rights advocates because we're getting this many more cases So it will have a trickle down effect.

ISAT: *So are you using the database?*
Michaela: I'm not using the database because I do not have the time. It's busy work to update databases.

ISAT: *So how are you handling information?*
Michaela: I am right now, all I'm doing...I'll show you…I have Outlook…My e-mail…These are the specific civil rights cases that I've worked on. Here are the ones that I'm following up. And then I have little itsy bitsy ones, and that all I'm doing is creating folders…These are like letters to prisoners…we get a lot of complaints from inmates (they give accommodation to Jewish, Christian people but they do not give accommodation to Muslims, so that's something we're working on right now because that's something that's protecting under the law of this country). So these are letters that I've written to them. So I'm organizing these on my e-mail Outlook by case and in folders. And eventually it needs to be transfer to National office.

ISAT: *Anything else?*
Michaela: We also have a QuickBooks; it's an accounting software. And just because of the amount of time that thing takes to load, to update and understand, I have a volunteer accountant doing that, but eventually we'll hire somebody to do. I'm not doing that right now but there'll be things that I do that will be tied to that. For example, I sent out donation receipts to donors. That's something that should be generated from that database. I just didn't have anytime to coordinate with Bilal, so he just generated a report from that software and we mail them all out. I personally mailed them all out and it's probably so inaccurate…but what can we do… (chuckle) It's a man power issue...so...

Regularly Scheduled Tasks Questions

ISAT: *Are there tasks that you perform on a scheduled basis? (For example: weekly, biweekly, monthly, quarterly, yearly?)*
Michaela: With civil rights thing, it's definitely one. Number of cases opened, closed, and pending…that's supposed to be given to national yearly at the end of December, which we never did.

ISAT: *How do you give it to them, to their database?*
Michaela: We burn a whole database to a disk and mail it to them. And they download the report, and manipulate it and do however they want to. Right now we're working on doing ACH withdrawals account so people can donate monthly like a voided check. We also want to do credit card withdrawals for people who donate monthly via credit cards or ATM. And that's something that we really depend on the system but we ended up using Bank of America. We do it monthly to in order maximize the fees we have to cover we do them all at one time.

ISAT: *Is this something that you're not doing but you'd want to do?*
Michaela: This is something that we'd want to do. I have all this information about ACH and Bank of America, credit cards…I just have to compare the set of fees and I have a deadline, I have to have this done by the fundraiser. People don't have a thousand dollars to donate, but they're more than happy to donate twenty dollars a month. But for a person to remember that with everything else…it's too much. With ACH, it's easier for them…they don't have to remember to write a check. And for us, it's cost prohibitive to remind people to donate…we don't have the time to do that.

Michaela: What else on a monthly basis? We have board meetings and I'm supposed to keep a message log.
ISAT: *Minutes?* Yeah, a log of minutes.

ISAT: *So have you been doing that?*
Michaela: Yeah I have, but it's not complete.
ISAT: *And those are monthly, or weekly, biweekly?*
Michaela: It was weekly, but now it's biweekly. I'm weeks behind of typing up these logs. It's not supposed to be my job; it's the secretary's. Because of his English barrier…I mean he speaks English really well, but to take notes, you guys know how it is…it's a foreign language…so he can't do it with speed.   Going forward we may start doing things on a monthly basis

Michaela: We're playing catch up right now.

Information Collection Questions

ISAT: *How is the information collected/gathered? Donators' information for example…*
Michaela: There are a couple different ways. Two major ways: the first way is that...just explain how CAIR works: CAIR National was founded in '94. And from them sprung 25 chapters in the U.S. and Canada. Each chapter opens and operates as a separate entity even though they all share the name CAIR, CAIR-Arizona, CAIR-California…etc…All of them

are technically and legally a separate unit. The only thing is that we collaborate. Basically, national approves each chapter based on very specific guidelines. But you still have to operate yourself. You get very little help from national. The only thing that you do get help from national is one - membership. When you go to the national website, you can become a member. (And this could be a monthly thing) They're supposed to send you updates on who are the members, whose have expired and who are the current membership because it's $10/year. We don't actually get the money, but CAIR National does. But they provide us the names of those people so we can solicit, we can contact, e-mail them and whatever you do.

Michaela: And also CAIR National puts out publications about the Qur'an and Muslims rights, geared toward law enforcements, different between health providers, and so on… And they provide them to us free of charge; all we have to do is pay for shipment. So our relationship with them is very different. Most if not all CAIR chapters are tax-exempt corporations. So if you donate, it's tax deductible. But the national office is not tax-exempt; the reason is because they do a lot of lobbying. Anything more than 5% to lobbying and you cannot be tax-exempt. Which kind of makes sense...even though…I don't know…? I won't go there… (Chuckle)

Questions about Donation Process and Finances

ISAT: *So can you take us through a routine if we were donating money, how that would happen?*

Michaela: You would have to contact our office, either by e-mail and send the check to our office. Right now I just set up a Pay-Pal account so people can actually send us money via Pay-Pal, via credit card or online to our e-mail address. So in terms of donors, we solicit people from CAIR. And also at our fundraiser last year, we had this card that people fill out (which I don't even know where they are, may be at the office). We wouldn't use them anymore; they're old and totally archaic. So we have two chunks of information: people who are members who didn't donate because they did the membership with CAIR National, and the members who donated that our fundraisers. Those are the two big things right now.

ISAT: *So he deals with the money right now?*

Michaela: Well, Rami is the treasurer, so he deposits the money to our account and then the deposit is tracked through Bank of America's bank statements. And two, he coordinates somehow with Bilal on inputting the deposits into QuickBooks software.

ISAT: *So he handles all the money aspect of it then?*

Michaela: Yeah, I would say that Rami does it more superficially, writing checks, but Bilal is actually tracking it. Neither Rami and I have a lot of experience (smile), I mean I have some experience in accounting software (MRP, similar to Oracle, but it's like a manufacturing software that's accounting based. I used to use that a long time ago). I'm not familiar with QuickBooks per say.

Member Tracking Questions

ISAT: *So when you're tracking donators and members information, do you keep that in a box, all the pledge forms for example, or the forms that you had them filled out?*

Michaela: It's in a spreadsheet. We have several spreadsheets. And what I just had a volunteer do was to…for example…We have a spreadsheet of everyone who donated at the fundraisers. We have a spreadsheet of all the members from national, ones who gave us their e-mails, ones who didn't. We also have a database of all the people who have registered to vote in the state of Washington and they went through us, either they have gone to our website and say that I am a registered voter, or they have registered through us and we input that information to the database. I think we have like 10 spreadsheets of people that we have contacts information on. I just had a volunteer put all of it together, but it has to be sorted. Because basically I'm very sale and marketing focused. These are the people that are potentially volunteers or supporters of CAIR in some way. And I want their names, address, if they have an e-mail, and their phone number. I don't care about the data whether they have donated or not; that to me is not important. Right now, I just want to see right now, who do we have in this community that we have contacts information for. And that is something that can be kept track off in the QuickBooks software. Because the QuickBooks that we have, it's very nonprofit specific and it actually has all these functions of tracking donors.

ISAT: *And you said that there's a database of members?*
Michaela: Yes, it's online through CAIR National and I have the password to access it.
ISAT: *Can you access other components of their database? Like would you be able to print out a report of all the members? People who have donated?*
Michaela: People donated to us or to CAIR National. *To you.* Yeah, I have a list of all the people who have donated. That's from the QuickBooks software because Bilal has input all this into the QuickBooks software, who's donated what.

Membership Questions

ISAT: *How about if somebody wants to be a member? Do they go through you guys and you guys have to enter that information into CAIR?*
Michaela: No, they'll have to do it themselves. From an operation standpoint, I think there's a big disconnection between CAIR National and us in terms of what constitutes a member. Because CAIR is getting those funds, and a lot of people that signs up as members in Washington don't even go to our fundraisers. There're different levels of members; there are members who actually do something and be active, and there are people who says they're members and pay $10/yr and that's all the commitment that they need. Most of the people that go into the CAIR National database are people in that pay $10/yr category and end of story. But there are people that we contact everyday that we consider members but may be they didn't pay $10/yr. May be CAIR National doesn't even recognize them. So there's a huge disconnection between what we consider members and what they consider members. Is there no cohesion? Is it not necessary?

ISAT: *I get on the newsletter that you guys send out…The e-mail...*
Michaela: Now see there's no cohesion between that either because people sign up …may be…I don't know…Rami does this, you can ask him…anyway, people can sign up to get e-mail alert, but we don't know who they are, may be they are not on our member list, may be they're not on national's member list. Who knows? No cohesion

ISAT: *There's one e-mail that I got that says it will be discontinue if I don't send in the $10 membership fee?*

Michaela: CAIR National sends out e-mails to their e-mail list, because I think they haven't focused a lot on their membership drive, so people aren't realizing that… for example…I pay one year, and I didn't pay for two years after that, and I just paid recently…so they don't have a very good system to remind people to update their memberships. So I think they were just trying to light a fire and tell people 'Hey, you know, is your membership still valid? Did you pay it in '95? You need to update it…' I think Rami is sending out that e-mail again. And there's so little cohesion between these things.

ISAT: *Is the newsletter done by national?*

Michaela: We do our own, and then national has one. Certain CAIR chapter has their own e-mail alerts

ISAT: *How often is the newsletter?*

Michaela: I want to do them weekly (chuckle) but that's just too much work.

Job Reflection Questions

ISAT: *What part of your job do you find time consuming/exhausting?*

Michaela: Everything…(laugh) The busy works because if you look at the things that I'm responsible for, there are so much busy works associated with all of them that I would need, for example, an administrative assistant, I would need a civil rights advocate, a media relation coordinator. But instead, I'm the one who's doing all this busy work so it's hard for me to manage because I can't disconnect, because I don't have the human resources to be a manager. So I am managing but I'm also doing the work myself.

ISAT: *So you're managing yourself?*

Michaela: Yeah, or people who are actually willing to help us who are volunteers and are committed…Data entry, updating databases, updating civil rights things …We have a huge events calendar of all the things happening in our community. I can input it into my Outlook, but it would be nice to have it online so that people can access it online and see what's going on in our community or related community that affect us. And I just cannot do that, it is physically impossible. I'm getting my MBA too by the way (laugh)

ISAT: *Is there something you perform that you find can be made easier/automated? (What is it?)*

Michaela: The message log (phone calls) is one specifically. I think sending out press releases can be a little more automated because we have this mega list of e-mails and phone numbers, fax numbers. And we have WinFax software but I have not installed it, I tried, it didn't work at my house.

ISAT: *If you would like to change or improve one thing about your job what would it be?*

Michaela: Like hire 10 people (laugh)

ISAT: *Are there funds available to hire?*

Michaela: Yeah there are some funds. But the fundraisers will be the kicker.

ISAT: *If you can hire one person, what task would you like him to perform?*

Michaela: Right now, I think there are two things, either an administrative assistant so that I off load massive busy works, or a civil rights coordinator, which are two totally different skills sets.

Organizational Questions

ISAT: *How do you communicate with the volunteers?*
Michaela: Via e-mails initially usually….maybe coordinates meetings from home. Sometimes people drive from everywhere to our office in Lake City. It would maximize time and efficiency if we can get people on a conference call. I guess once I have the office then I can drive to the office, and we have multi lines. But we have two lines…we don't have seven lines…so… PalTalk is kind of the only option right now.

ISAT: *How are decisions made in the organization?*
Michaela: We have no formed process whatsoever because we don't have clear owner on certain things. If we have an executive committee, then this person owns fundraising, this person owns civil rights, then there would be escalation process. But there isn't one right now so everyone's just doing whatever needs to get done. I mean we have the figure heads. Rami is like the treasurer figure head, Bilal is the civil rights figure head. But sometimes things happen in the community, and even though Bilal who's in charge of civil rights, Samia is the one who drove that thing. Everything is sort of on the spur of the moment. We're very reactive and not proactive and that's part of our problem.

Questions about Tracked Information

ISAT: *Of this information that you are currently tracking, is there other information that you would like to track, but are not doing so at the moment?*
Michaela: Besides the events…(pause)…That's hard, I have to think about that…Not that I can think of that I haven't already told you.

ISAT: *Of the information that you collect what kind of use would you like to get out of it, or are currently using it for? I heard from Rami that you guys collect all these information but aren't getting much out of it?*
Michaela: Yeah, that's probably true. For example, we have information on who donated what, but it would be nice if we can…this is what some organizations do that I think…I don't know…wrong…but most organization categorize their donators…people who are $10,000 givers. It would be nice if we have a program like the (??) Institute (an Islamic University in Haywood, CA), they have created these different donor categories. If you donate $10,000/yr you get all of these different products…So that would be a nice benefits for somebody who donated … especially for a nonprofit organization…there's prestige associated with it. It's nice to know, of course you did this for Allah, for God, but it's nice to have an incentive, more tangible. That's just one example.

Questions about Key Players and Organizational Structure

ISAT: *I know that you do everything, but you keep referring to these other people. Is there a way we can talk about who plays what role because it seems like they do something at some point. So if this is you,…*

Michaela: Do you want me to draw an org. chart for you…

ISAT: *Yeah because then we can see if perhaps this person can take over and own it like you said earlier.*

Michaela: They are more like figure heads then they are doing things. The thing that Ibrahim does for example is that he's the head of the decisions. He's like the last person to go to. In terms of communicating things to the public, representing CAIR on a higher level, that's Ibrahim.

And Vice Chair, who's Samia is like second in command. If Ibrahim isn't there, then it goes to Samia. Ibrahim also makes sure that the things we're doing are getting us to achieve our goals and visions. Samia is also our media chairman. So it's really her responsibility to drive the media committee and kind of being a watch dog of the media to see what kind of blatant attacks are going on that the media does, or it's not giving fair representation of the whole thing.

Michaela: The board should be more of a figure head in general, and you have two other committees, one is an executive committee and one is the advisory committee. The advisory interjects ideas

Organizational Chart
Reformatted based on
Michaela's drawing
during the interview
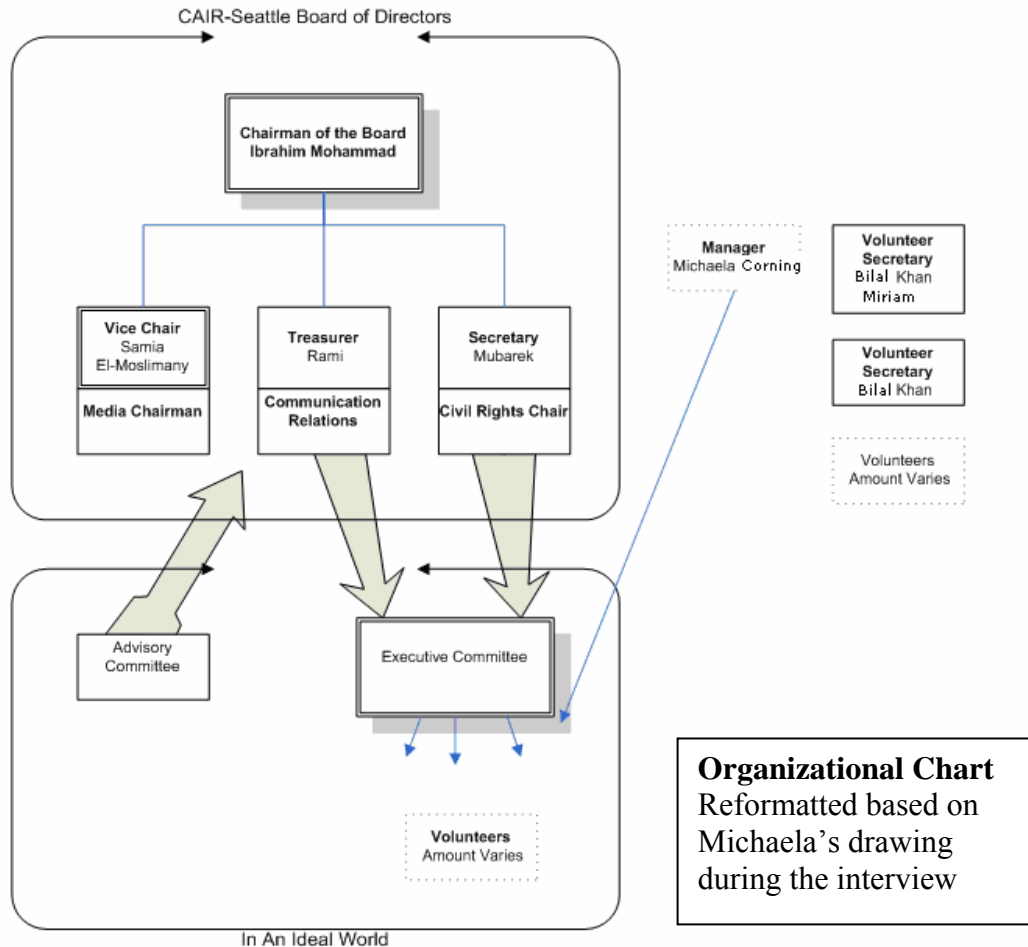
Data Collection Questions

ISAT: *If I was a client on the phone, what types of information would you need from me?*
Michaela: If it's a civil rights call, I have an incident report; it's a Word document and I enter the date of the call, the incident occurred, the name of the person who's calling, and the name of the victim, the person's phone number, e-mail, address, the name of the person or entity who violates that person's rights. And there's a synopsis that I go through with them so they can explain to me what happened.

ISAT: *Is it possible for us to get a copy of that document?*
Michaela: Oh absolutely. If you guys have a disc, I can burn it for you right now. Is it a floppy? I don't have a floppy drive. I could e-mail it.

ISAT: *What are some common data collection errors made?*
Michaela: Yes… for the fundraiser for example. It said that people donated certain amounts, but then what got entered into our accounting software is different. In some cases, there's a delta, what happened there, I have no idea

On the fundraising last year, people filled out pledges or wrote us checks. At the moment, they were putting it into the database to show people where they were. And it would track by the name, but then Bilal sends me the report of who donated what…people who say that they donated $1000…but when I look at the accounting record, there's no balance of $1000. So did we collect that $1000 or did we not collect the $1000? Or may be the person did it in somebody else's name. We got all this donations from the Palestinians' committee but we can't track that because we need a contact name.

Future Vision Questions

ISAT: *What do you envision or would like your information system to do?*
Michaela: My vision of an information system would be … QuickBooks on steroids. But the thing is that it doesn't interface with Outlook; something that interfaces with Outlook calendar would be really awesome. There's just so many different aspect of the business…I'm not working with QuickBooks so I don't know its limitations. But it would be nice if it's something that you can input into…without…being…
ISAT: *Are you not working with it because you don't have the training or...*
Michaela: Well that or the time, and it's also because we only bought one license so we just let Bilal put it on whatever computer he puts on right now. Once the office is running, then we'll transfer them to the computers at the office. For example, I'm used to using a system where every department can use that system. So for example you're in a manufacturing facility, you get an order, and you can input that order as a sale order into that system, and that sale order takes a record, and it's going to drive engineering, production, purchasing. In the back end, it's going to be able to be built from, and you can generate all kinds of report from that. QuickBooks is a lot more accounting focus. And although it tracks members, I don't know how much it tracks members.
I'm used to using ACT, I don't know if you've ever heard of it, it's a marketing sales tool that tracks customer, and in that I don't like ACT necessarily, but it is a tool for tracking customers.

Familiar Alternative Systems Questions

ISAT: *Do you use that?*
Michaela: I don't. I have used that but not for this company. QuickBooks just track donors like how much they donated and superficial information. But it would be nice to…be able to…I don't know how to explain this if you haven't used ACT before. ACT …for example, you can send a letter to someone, or email, and ACT will actually track that, it will create a record so you can pull up all the different things that you've sent to that person, even faxes. I don't think QuickBooks goes that far. So for example if you called, I was like 'what's your name? Oh Leila' so I pull up your thing and I see that on this day she has a civil rights complaint even though she's a donor…see what the whole picture of that donor is, not just from a monetary stand point. I think that's a lot more important because most of the people who are donors are not likely to have civil rights complaints. It's more likely the communities that are more impoverished. It allows you to do more profiling on your donors.

ISAT: *One person that you have mentioned in your email, Miriam,*

Michaela: Oh my very own volunteer (laugh)

ISAT: *I guess she helps you with data entry, spreadsheets, tracking members, donors,*

Michaela: She has been doing a lot more data entry, but she hasn't been doing the tracking on the back end. For example, we do like a direct mail campaign, one that was focus on donors, members, individuals and one that focus on businesses because we wanted a lot of sponsors to the events. You get advertising and things if you are a sponsor. There's a thing call the business directory, I wanted her to put that in a spreadsheet for me, all the information … so that I can do a mail merge from it, which is really inaccurate…because mail merge is too…anyway… Some of those businesses ads are outdated; we get about 10% of them are correct. Which is a pretty good number, I think that's pretty high. I do not have the time to go though the database and make a note that there's an incorrect address. Nor do I have time, so I have a volunteer doing this, to go through and make calls to every single one of these businesses and say 'Did you receive one of our…dah dah dah...Are you interested …' and making a personal contact with that person. QuickBooks can't do that. ACT can. You put in a business, and then you can select different categories…this person is a donor…this person has civil rights complaints...this person is a business owner and we're looking to them for sponsorship.

ISAT: *Why don't you use ACT? You don't like it?*

Michaela: I personally don't like it. There are better tools like the new Microsoft system that I can't remember the name right now… it sounds like an acronym… It's brand new…not even a year old. But something like that can create profile; you can track all types of contacts (vendors, buyers, donors, etc)

Second Interview of the Council of American-Islamic Relations Manager

Interviewee: Michaela Corning (Manager)
Interviewers: Laila Almounaier, D.T. Tran, Tina Norman

Miscellaneous: Interview was record with permission of interviewee under the premise that it would be used for academic and note taking purposes only. This will be the second interview of Michaela. The interview was preformed in a coffee shop. This is the third revision of this data collection instrument. The questions below are presented as they were asked during the interview. A copy of the transcript follows the question outline. These questions are follow up questions from the previous interview as well as more focused close ended questions to better help focus our analysis.

Goals

   o   Follow-up on answers given in first interview.

   o   Explore topic of potential volunteer participation.

   o   Obtain information regarding financial resources.

   o   Obtain information on current computer system resources.

Questions

Follow-up Questions
   1. You mentioned that you currently have about 10 spreadsheets of contacts information. Can you please list the ways and purposes for which that information is or could potentially be used? E.g. mailing lists, phone trees, reports to CAIR National.

   2. You mentioned that you have a password to access CAIR National database? Are there other people who have access?

   3. How is that database accessed?

   4. What data fields does the CAIR database provide and how is it formatted?

Probing Questions on Unique Identifiers
   5. Does CAIR National assign some type of unique membership number to members? If so, can you get those numbers?

   6. Do members have membership cards?

   7. For administrative purposes, do you have any problems with assigning member id numbers and/or membership cards?

Question about Volunteer Service

8. What requirements are there for letting volunteers and other outside people have access to your data?

Questions about Data Errors, System Requests, Current Processes

9. Of the data recording errors made, which is the most time consuming to correct?

10. Is there any extra information that you would like to store that is not currently gathered and/or recorded?

11. Why isn't incident data entry made directly into the Access database?

12. Is there a reason the database isn't left open to make it easy to access?

13. If you had to pick one or two areas to focus on that you currently have a problem with what would they be? For example, accounting, communications handling, contact handling, etc.

14. Where are calls received (at the office, cell phones, at home)?

15. What are their requirements for remote access to an information system, such as for administrators working at home?

Questions about Finances and Future Help

16. How many new man-hours, in the form of new paid employees, do you envision adding and at what time?

17. What kind of financial resources could be feasibly dedicated to an initial information system installation and regular maintenance?

18. Do you have members who have known talents in the fields that they are looking for that would be willing to help?

19. What computer hardware does the organization currently own?

Questions about Technical Resources

20. Do you have Internet access at the office? If so, what kind?

21. What kind of Internet serving resources does CAIR National provide? For instance, do you have access to the www.cair-seattle.org server and what is it capable of doing?

Michaela Corning Follow-Up Interview Transcription

Follow-up Questions

ISAT: *At the last time, you mentioned in the last interview that you have about several spreadsheets of contacts information. Can you tell me some ways and purposes for which this information can be used? For example, mailing list, reports?*
Michaela: All of the above.

ISAT: *Anything else?*
Michaela: Pause…mailing list? I think direct mail, I mean marketing, I don't know if that's what you mean by mailing list. I'm just doing phone calls of members. Like for example, CAIR LA, one thing they do is they have volunteers and they have what's called phone banking, and months before the event, a week before and presale, we have people cold (?) calling members saying 'Hey, did you buy your tickets to the fundraiser yet?' 'Oh no, I haven't' 'Oh well then let's charge it over the phone'. We don't have the resource for that, unless you guys want to volunteer. (Laugh)

ISAT: *And then you said that you a password to access CAIR National database? Are there other people who have access to it?*
Michaela: Um…I gave a volunteer access to it so she can update it. But besides that, I don't think there's anybody else.

ISAT: *Can you tell us a little bit about how it is accessed?*
Michaela: Just as a website, and there's a log in and password. You just go in, and you update and add like new registered voters in there, people that you know are registered but didn't filled out the form that we have. That's pretty much it. And you can generate reports like how many people are in the state of Washington, people in the state of Arizona. It will go into Excel so you can download it as an Excel spreadsheet.

Questions about CAIR National Database

ISAT: *Can you tell us a little bit about the data fields that the CAIR database provides? And how it's formatted?*
Michaela: Which database? Do you mean the accounting? The QuickBooks one or…?

ISAT: *Well, actually, I think what they mean by that one is the contacts?*
Michaela: You mean like Microsoft Outlook? Or …which? Can you repeat the question?

ISAT: *Do you know what fields.?*
Michaela: We don't really have a …

ISAT: *Actually, go ahead and let me know about the CAIR National*
Michaela: Ok. Sigh…

ISAT: *Because I know that you don't have a database for contacts.*
Michaela: Yeah we don't.

ISAT: *And the other database that you have is the civil rights?*

Michaela: With the civil rights we have it in QuickBooks, which is like an accounting software, and that has database fields, but we haven't…I mean I'm not using it...So...like… it would be hard…You'd have to ask Bilal. Didn't I email you his contacts information?

ISAT: *Yeah*
Michaela: Okay, because I don't remember anything (Laugh).

ISAT*: Yeah, we're meeting with him tomorrow.*
Michaela: Oh good.

ISAT: *So how about for the CAIR National's?*
Michaela: What was the question? I don't remember the question now.

ISAT: *The data fields that're provided, how's it formatted? Like first name…*
Michaela: The data fields are name, first name, then last name, street address, um…state, zip, phone number, email address, something about are they a registered voter, duh, I don't know why they even put it in there because that's not even why you're entering it. And then there's one that says what mosque that they attend. Random! We don't even enter that part of it. And then um… there's also fields that say what the sources of that information, like who's entering it and one that says CAIR Seattle, we always put CAIR Seattle as the one who…because we can see…because some are actually generated by people going to the website and say that 'I am a registered voter', and that will update the site. Um…But I don't know how… I don't know what sorts of ways they track those ones, but the ones that we specifically enter, we click CAIR Seattle as the source of that information…so…

ISAT: *So do you know which fields are required? Like you have to put in where there's an asterisks where you have to put in...*
Michaela: None of them says that. Yeah. Because sometimes we get people but they don't have an email address for example, may be they don't even have a phone number.

ISAT: *But not even first name or last name?*
Michaela: Um…None of them says required or optional so I never tested it out.

ISAT: *Okay.*
Michaela: That's a good question.

Entering Membership Data

ISAT: *So I think this is actually might be where, because they have here membership database, I know you guys don't have like a membership database, but when you enter members, do you enter it through the CAIR National database, when somebody comes in as a new member?*
Michaela: No, actually what happens is that national tracks all membership. And to become a member of CAIR, you go the national website, and they track that in theirs, and you pay your $10 a year, whatever it is. And every…every…whenever I want I can call CAIR

National and say 'Can I get a print out of that?' And then they can send that to us. So it's not something that we can see live at all.

ISAT: *I think that's where the confusion is, because you guys have members but they're not official members, and they might not pay that $10*
Michaela: Exactly. It would be really beneficial to us if the database could say what kind of member that person is. Is this the person that fills out the $10 a year thing? No, yes. Is this the person…may be that didn't come up but they give us $2500 every fundraiser. We don't care for that $10, we don't see that money anyway…frankly, because that's CAIR National's. But if they are…and may be having like a donor category…What kind of category is this member? Does this person basically volunteer their time and they don't actually donate any money to us? Is this a person who does…May be something where you wouldn't just categorize them by a single field, may be they could be multiple fields. Like yes they are volunteering, yes they did the $10 a year, yes they donate this certain level…

ISAT: *But you don't actually put that in there at all?*
Michaela: No, but that's something we would like to do. And these are good questions for Bilal because the QuickBooks software actually has a membership arena but I don't know anything about it and I don't know if it's that complex.

ISAT: *You don't know if it gets enter in there or not?*
Michaela: Something is entered in there but I don't know…I mean I can't really… I know that Bilal has given me a report, for example, of who donated what last year because I needed that for sending out receipts or whatever. He gave me that report, so he MUST have entered information, but I don't know if that was something that was entered on the accounting side because he puts people's checks …, when he's looking at the record, he wrote down who…or is that stuff actually the membership part of the data base, I have no idea.

ISAT: *Ok, when you guys ask for, may be at fundraisers, somebody says that 'I want to become a member,' do you guys have a separate spreadsheet that has a bunch of people's name and address information?*
Michaela: Is this last year fundraiser?

ISAT: *Oh I don't know if it was at a fundraiser, but it was a spreadsheet that you sent, one of them was 'Members' spreadsheet.*
Michaela: And does it have like how much people donated and that kind of stuff?

ISAT: *I don't think it did. I was looking briefly at it, maybe it did…but…*
Michaela: There was one that says CAIR fundraising something something at the title of the icon. And that shows like how much people actually has donated or pledged and yada yada… And then we have…a lot of these…a lot of database…a lot of those spreadsheets I sent you, especially the ones that say like um…members, no email, members' telephones, those are some of the names of the icons, do you remember? Because those are the ones that're from national, they're crappy. Because they're like…why would we want somebody's name when we don't have any contacts information for them?

ISAT: *Yeah, the spreadsheet that I saw just has first name and last name, address...*
Michaela: Did it say 'master spreadsheet'?
Yeah
Okay, that one is a conglomeration of like all this crazy spreadsheet. That is a mixture of the voter registration database, the multiple spreadsheets we got from CAIR, the fundraising thing,

ISAT: *So basically anybody and everybody that you can get their names...*
Michaela: People who attended our caucus event and we took the information off their checks…it's kind of mass marketing…any information that you can get is like spam spam. See I'm in sales, that's my background, so that's how I'm thinking.

ISAT: *So you guys don't have an official like 'This is a form, fill it out…'*
Michaela: We have a form; it goes straight to national. For CAIR-Seattle, we have nothing, zippo, zilch, nada.

ISAT: *Do you know… does CAIR National assign unique membership number? A unique identifier?*
Michaela: I think they do…

ISAT: *But you guys don't see those…?*
Michaela: I see, I see it, but I get rid of them, because they mean nothing, absolutely nothing to us. And I have no idea if they actually …see this is the thing, I don't know if you saw those CAIR National's email about we were trying to get 25000 new registered dah dah dah…CAIR National has absolute no way of reminding people when their membership expire. So a person like me, I mean I became a member like three years ago, and I just renewed it again this year. But it didn't ask me to renew it the year before…like it was my official renewal this year. You have no way…I mean usually if you subscribe to a magazine, they send you a reminder that you need to renew your subscription. And CAIR doesn't do that, which is so stupid.

ISAT: *And then I'm guessing that members don't have membership cards?*
Michaela: Um, we create membership cards last year but that's not something we're doing…I mean …no one has given me information about that at all…so no

ISAT: *For administrative purposes, do you have any problem with assigning number, id numbers and or membership cards?*
Michaela: What was the question?

ISAT: *For administrative purposes, do you have any problem with assigning number ids and or giving membership cards?*
Michaela: No, I mean that's definitely a possibility, it's only a matter of having the resources, human resources, to be able to check that, logistically speaking you know, that sounds like a nightmare (laugh)

ISAT: *And what requirements are there for letting volunteers and others outside people having access to the data?*
Michaela: Basically just personal relationship…basically if somebody comes in there and they um volunteer, they have to have some personal reference from someone on the board. I mean it's not just like some Joe Blow emails me and says 'I'd like to be a volunteer' and I'm like 'Oh let me send you some spreadsheets'. No, I'd have to know that person personally or somebody from the board does. We have other volunteers and they do like manual labors, lift boxes or whatever

Data Collection and Input Quesstions

ISAT: *Of the data recording errors made, which is the most time consuming to correct?*
Michaela: Of data recording errors? I would say…probably all the things related to donations and tracking the pledges and who're actually fulfilling their pledges. I mean who were monitoring this before I got here, I don't know. It doesn't make any sense to me. I mean I have this spreadsheet and I try to reconcile with what's in the accounting software…completely different!

ISAT: *And is there any extra information that you'd like to stored that are not currently gathered and or recorded?*
Michaela: In general? Oh let me just make a laundry list for you (laugh) I mean that there's all of the different classifications of donors, is a big one, also if there's a way to tie in people's attendance at our events, that would be really crucial to see, you know, who's actually coming to our events, who are members, what the delta and why basically you know. So um… because what keeps this organization alive is donation and pledges…and …if we can't keep track of that from a marketing and sales perspective, we can't really forecast whether our organization is going to be viable going forward so... that's very very crucial.

ISAT: *And why isn't incident data entry made directly into the access database?*
Michaela: Why isn't incident? You mean civil rights, why isn't it entered? Um because I don't have time, it's time constraint, and because I haven't had any training on the database. And actually there was training on Monday and national called me on Friday. I mean we don't have a live office phone, it's my cell phone and I check messages. So the time difference between when the phone call, the conference call for Monday, and the time I check my messages on Friday, I missed that. And so I missed the training. How annoying…anyway…And I haven't had time to follow up with that guy

ISAT: *So is there a reason the database isn't left open to make it easy to access?*
Michaela: Well I can't…I mean there's no point in having it running, using space while I can't even…I need to train myself…I need to either train myself, which takes a huge amount of time, or have somebody else train me, which I didn't know was available and I missed it. And I have to reschedule or do something…and so…We'd just have somebody, we're actually hiring someone; I don't know with what money…we're going to pulling it out of the sky (laugh)

Areas of Focus Questions

ISAT: *If you have to pick one or two areas to focus on that you're currently having problems with, what would they be? Can you give us some examples? Like accounting, communication handlings or contacts*
Michaela: If you have to pick one or two areas to focus on that you're currently have a problem with what? I need to read that and absorb it. (Reading) Sigh...Um…Memberships, and the accounting side, and civil rights…I would say that those are the three that I would say are the biggest problems right now.

ISAT: *When you say accounting, are you talking about the donating…*
Michaela: I'm talking about donating. I'm talking about reimbursing people for expenses. I'm talking about generating receipts for people because they're tax-exempt.

ISAT: *So all money?*
Michaela: Yeah all, even vendors, I mean having vendors listed …all that kind of stuff…

ISAT: *And then, I think you already answered this one just a little bit ago where all calls received and doc on the cell phone at home*
Michaela: Cell phone and office voice mail which I retrieve.

ISAT: *Are you guys moving to the new office?*
Michaela: We have a new office, but um… I can't move there until somebody in the board finds time to kind of put it together in terms of IT and phone system. It's just like the civil rights thing, you know, it's an opportunity cost. I mean do I spend this much time training myself on how to operate the phone and how to put them all together, or do I do this much work that I have piled up. Well, I'm willing to do the work, you know. And right now I have my office set up at home. It's ready to go and I can just jam and get it done. And I don't have the luxury right now to go to the office and messing around with things.

ISAT: *How many man power, in the form of new employee, do you envision adding and at what time?*
Michaela: We're adding (laugh) a civil rights coordinator, and we're adding a voter register…I don't know what you call it, a project coordinator position-someone who picks up civic education and voter registration, um…and that's happen…I mean we have…um…we just sent out an email this last couple of days to different groups advertising the position, the positions I should say…um…So that's going to be hire immediate, that's going to be immediately.

Questions about Financial Informaion

ISAT: *What kind of financial resources is going to be feasibly dedicated to an initial information systems installation and regular maintenance? Ball park…do you know?*
Michaela: I have…I have no idea. I really have no idea. That's a good question for Rami I think. He is our treasurer.

ISAT: *I just thought that's a question you could answer.*
Michaela: I probably could if I go home and like spend an hour and a half going through it, but I just…I just don't have the time. And Rami has direct access to that stuff, and I don't.

Availability of Volunteer Help Questions

ISAT: *Do they have members who have known talents in the fields? You guys have members who have talents in the fields that you're looking for, that would be willing to help.*
Michaela: Um…There are members that have known talents, but the kicker is that are they willing to help (laugh). I found that they're willing, but it's really just time constraint. And I don't necessarily think we have entirely identified who have what strength.

ISAT: *We're actually maybe taking some surveys to...*
Michaela: Are you talking about the community survey thing?

ISAT: *Actually it's a survey that we've came up with just so see what kind of see what people, what computer skills people have that we might be passing out during the...*
Michaela: Okay. You talked to Rami about that?

ISAT: *Do you know who permission I should probably ask?*
Michaela: I'm the one coordinating the fundraiser so… (laugh)

ISAT: *Ok, so I'll leave that question to the end.*
Michaela: Okay, we'll talk later.

Current Computer Inventory Questions

ISAT: *What computer hardware does the organization currently own?*
Michaela: They don't know. I'm currently renting it out, for free. Um…We own four phones… I've been told that that's not computer hardware (laugh), well they're very high tech multi-line phones so they're not exactly like…Sigh…What do we own? We own a computer and a hard drive but it's not useable; it's too old. Somebody gave it to us, and we fired it up and we were like 'Oh my god'. So we really, at this point, own nothing. No computer hardware.

ISAT: *How about we talk about what is it they don't own but are using?*
Michaela: Mine, I have a Dell Inspiron 8200, and it's like a year old or something. Basically, that's a lot of the reasons why they hired me because they didn't have an office when I got hired, and the fact that I have a home office set up already for my previous job. I think that's why they were like 'Oh it's going to be a no brainer…you got a computer, printer, scanner, you got a fax machine that copies, dah dah dah'

ISAT: *What versions of the current software do you have?*
Michaela: Bilal would know the QuickBooks one. The "civil rights" Access database, I…I don't know the exact version; I mean I know that Access in general is version specific, but is

the actual database version specific? Because I know that you can…just like old Word…you can open an old Word document in your current XP

ISAT: *What version of Windows are you using?*
Michaela: I'm on Windows XP. I have like Microsoft Office Professional XP 2003 or 4. But I didn't create that database; it was created at national and sent to me.

ISAT: *How was it sent to you?*
Michaela: On an email, it was zipped. Didn't I send it to you? Why don't you open it and look at the properties and check it out?

ISAT: *Depends if it will open, like you said if it's going to on regular Access like whatever version that I'm running…*
Michaela: If you have Access I think it's going to open it.

ISAT: *Yeah, but I'm worried if it's going to list the current version that I'm on or the version that it was.*
Michaela: May be if you save it to your computer and just right click on properties and without just opening it, may be it will tell you. If not, then I can email national.

ISAT: *Any other software?*
Michaela: Um…I have Microsoft Project but I'm not using that yet. And we have WinFax Pro, do you know what that is? It's like a software that enables you to send out multiple faxes for doing press releases and stuff like that. It's brand new; I mean it's the newest version. I'd have to go home and look at the box.

ISAT: *So WinFax…we'll just look at whatever the newest version…We've also been looking into your CRM suggestion…*
Michaela: Oh the…Yeah, it's pretty awesome. The last company that I was at, they were ditching their ACT and going to Microsoft CRM. Wow

ISAT: *So WinFax, and you said Project, but you're not using that?*
Michaela: Microsoft Project… I have to think about that. I think Microsoft Office XP Professional, WinFax (not really using that). I just downloaded a bunch of virus software, ZoneAlarm, it's a firewall. And I donated, what am I saying…I downloaded Adware, which goes though and wipes out spyware and stuff. Oh my god, I had 95 things on my computer. You can go to download.com and you can get those things for free, and they're not even trial, they're free versions.

ISAT: *Do you have the free version of ZoneAlarm?*
Michaela: Yeah, and I have the free version of Adware.

ISAT: *And what kind of software license do you have?*
Michaela: Just personal…I don't know about QuickBooks though; you'd have to ask Bilal. I don't know about that. I think that he got…I don't know, you'd have to ask him

ISAT: *Is there Internet access at the office?*
Michaela: DSL actually.

ISAT: *Does CAIR National provide any Internet serving resources?*
Michaela: No

ISAT: *Do you have access to the CAIR-Seattle.org server?*
Michaela: I don't know if it's actually a server though. It's like hosting or something. May be I should give you Imran phone number. He's like our IT guy in California. He moved. He would know about the IT stuff. Let me just find his phone number here. He's really nice and he'll help you. Ok so his name is Imran; his phone number is 1-805-300-4262. He actually owns an IT company here.

ISAT: *Do you backup of all your data?*
Michaela: Like on my computer? Turn off! (Laugh) No I don't actually…Well I guess some of it we do. Because some of it is housed on our yahoo site, so that would be technically a back up, but it's not all there…Just another project that I need to do.

Questions about Key Players Roles

ISAT: *And the last time you have mentioned Mubarek, who's on the board?*
Michaela: He's our secretary and he's also our civil rights chairman.

ISAT: *Can you explain just a little bit about his roles?*
Michaela: The roles of a secretary is 1) to take meeting minutes, and he's supposed to keep them in a file…and um…he's passed them to me and I can't keep it up to date to save my life. And um…as a civil rights chairman he also negotiates with different partners like Hate Free Zone and ACLU. Um…one of the things…one of the things that he um…actually …that's… civics education, the person that's titled project coordinator. We're actually going to be sharing resources with Hate Free Zone, so we're going to be paying half of that person's salary. But they're actually going to be in Hate Free Zone's office. But there's going to be a chair/Free Zone employee. But he'd actually like to offer that civil violation piece because it should be a person by themselves, not shared duties. Because that's just too much work you know for one person.

Questions about Civil Rights Database

ISAT: *Do you know if it's required to keep the civil rights database separate from any other database?*
Michaela: It has to be separate only because it has to be given to national on a yearly basis because um…what's his name...

ISAT: *Not just the data but the whole database?*
Michaela: The whole database is given to national because they um… what's his name…Dr. Nemir (?) whatever…he's our research director. He's the one who puts together that civil rights report every year. It's reporting how many civil rights incidents and yah dah yah

dee…We're supposed to give it to him but we couldn't…we just couldn't get it updated, so…

ISAT: *I think the reason we're asking is because we're thinking of adjusting this database…So you need to stay with this database so that you can have the information to upload to the national database?*
Michaela: Yeah I don't think the benefits to…if you create it in CRM or something…I don't see the benefits to having those things linked at all. Even if it's a member who happens to have a civil rights claim or something…I don't …I don't necessarily see it being entirely…I mean…there could be a benefit like you could just see who's a member and who's getting violated but I don't know if it's that pertinent.

ISAT: *It doesn't matter what kind of systems that come up, you'd need to log on to that database and upload the information no matter what. You need the chaining to be able to eventually go directly to it*
Michaela: Yeah I mean I know that there are systems that can feed into each other, and so you can feed them into each other…but as long as you can keep some of it separate. And I think CRM has some of those capabilities you know, that's why they have a web interface and everything…so…I don't know…my god

Revision of Data Flow Diagram for Accuracy

ISAT: *Can you take a few seconds to see…I don't know if you're familiar with data flow diagram or not but just to see if there's something that's like 'no way, this is not what happens'*
Please see the dataflow
Michaela: Hany is a board member too but he doesn't have a position that's like a title, besides just a director, and his name is Elkordy.

ISAT: *Does Bilal go to the board meetings?*
Michaela: No. No…I mean he has in the past but we didn't think it was really best use of his time since has a lot of data entry to do (laugh).
Now the donations are coming from the Muslims community through me, but I don't know if that's very clear on the diagram. Because there's no flow…do you know what I mean…It looks like it's coming personally from me or something…May be it should be more clear…
I would say that um… Bilal is not …he's actually a volunteer accountant, not a volunteer secretary.

ISAT: *I actually emailed him and set up an appointment for another member to meet with him, and he wrote back and his name was Mohammed.*
Michaela: It's Mohammed Bilal Khan, but he goes by Bilal for some reason. So… he's never introduced himself as Mohammed…

ISAT: *Because he signs his name Mohammed in the email…*

Michaela: Because in Pakistanian culture, there's a lot of people who's named Mohammed. But they usually use their middle names because they think it's like disrespectful to go by the name of the prophet Mohammed, which is totally a Pakistanian thing.

ISAT: *Donations never go directly to Bilal, so can we cross that out?*

ISAT: *Not even the information about...*
Michaela: The information does, but not...but it usually goes through Rami. I wouldn't even say that Rami gives it to Bilal. I would say that it goes to Bank of America and Bilal's getting those information via the history of the deposits

ISAT: *So Bilal is not actually getting the sheet that says who deposits what...*
Michaela: No

Michaela: I would say that here one line would be monetary and one would be information-based. And I think that the only thing that gets filtered to him directly is the information-based stuff if they needed to be. And here, all this stuff is going to Bank of America and he has to have that money signed. I think it might be important to differentiate between the two things in terms of the process flow.

Michaela: He processes certain thing and he'll provide reports to Rami. And he also provides reports directly to me. I don't give him information, but he gives information back to me.

Michaela: And I don't think that this is an ideal system. I mean my personal opinion is that we need an accountant, or an accounting person in the office, someone who can be a receptionist and an accountant, who can transfer phone calls, and that kind of busy work, and then also someone who can update the database, the civil, the accounting database, who can track all that stuff, do payroll, yah dah yah dee. That's what I envision (laugh)

Michaela: I don't give anything to Bilal, donations or information.
I'm just a filter really. But honestly, all board members receive donation and give them to Rami but they don't have a significant role in that
Miriam doesn't have anything to do with the civil rights database, should I cross that off? She does data entry but not to the civil rights database.

ISAT: *Who's doing entry into that?*
Michaela: I'm supposed to be but I don't have time...so...yeah. Um hm...I mean I still have things to follow up on like cases but I can't because of the fundraiser you know.

ISAT: *Does the civil rights database connect to the ACLU at all?*
Michaela: Yes

ISAT: *Both way?*
Michaela: Well, I wouldn't say that the civil rights database can feed back to the ACLU (laugh) but I do. So I do...like...

ISAT: *We should just put you in the middle with like…*
Michaela: I think…I think I should be in the middle because if you think about it…you have the board members at the top here, and they all have their little functions or whatever. And then I'm here. All of their information feeds into me, and I feed out to these different systems, except the accounting one. And Bilal's kind of like out here on the side, do you know what I mean. I think if you have the hierarchy a little different, it might…
And I report directly to Ibrahim, and the other board members feed information to me.

First Interview of the Council of American-Islamic Relations Secretary

Interviewee: Mohammed Bilal Khan (Secretary)
Interviewers: Ryan Prins, Aaron Smith

Miscellaneous: Interview was record with permission of interviewee under the premise that it would be used for academic and note taking purposes only. This will be the first interview of Mohammed. The interview was preformed in a coffee shop. This is the third revision of this data collection instrument. The questions below are presented as they were asked during the interview. A copy of the transcript follows the question outline. This interview contains a majority of open ended questions since this was the first interview with this individual. Also, some close ended questions are included from information that was analyzed from previous interviews.

Goals

- Find how Mohammed fits into the organizational system. Figure out what exactly his role is, how long he has been in that position, and what tasks he is specifically in charge of.

- To gain a more substantial picture of CAIR's information, procedural and organizational systems by getting a second, distinct and disparate perspective of them.

- Get a better understanding of how their accounting system works.

- Find out what obligations they have as a NPO for financial statements.

- Obtain suggestions from Bilal on what he thinks would benefit CAIR.

- Get a feel for what he sees as the problems with the current system.

- Get a better understanding of how Bilal is involved with the civil rights aspect of CAIR.

Questions

Introductory Questions
1. What exactly is your role at CAIR?
2. What do you do there?
3. Do you have an official position or a title for what you do?
4. How long have you been doing the basic QuickBooks accounting?
5. Within in your position of doing the QuickBooks accounting, what are your specific tasks that have been asked of you from the organization?

Probing Questions on Position

6. When you are working with QuickBooks, what is it you are generally doing?
   a. Is it inputting data, generating forms?
   b. *Follow up:* Forms are created one time?
   c. *Follow up:* Is very frequent that you change them?
7. Do you ever get any forms from the national body of CAIR to use within QuickBooks?
8. Besides QuickBooks, are there any other tools or programs that you use to do your tasks for CAIR?
   a. *Follow up:* Do they work well together?
9. How often are you using QuickBooks to input data or to output data?
   a. *Follow up:* You just wait until you get a month's worth of data then take a day or so and input all the entries?
10. Are there things that you have to have completed for quarterly or yearly deadlines?
    a. *Follow up:* Do these need to be forwarded to the government or the national branch of CAIR?

Questions about Suggestions, Storage, and Processes
11. Of the tasks that you perform that are time consuming what is it that you find exhausting?
12. Do you make physical copies of checks to keep for the records of CAIR?
    a. *Follow up:* How are those stored?
13. Is there a task that you perform now that you think could be made easier or more automated?
14. If there is one thing that you would like to change or improve of the tasks that you do for CAIR, what would be one, or a couple, of things that you would like to change or improve?
15. Of the way that data is stored, collected, and processed, what do you see as some of the hindrances or problems that arise?
16. Do you ever have to get contact from the Excel spreadsheets that CAIR-Seattle uses?
17. When using QuickBooks, have you found any problems with the software that hold you back from performing your duties properly?

QuickBooks Specific Questions
18. Do you know which version of QuickBooks you are currently use?
19. Is that a license that you purchased?
    a. *Follow up:* Was it a special kind of license?
    b. *Follow up:* Were you reimbursed by CAIR?
20. Have you used QuickBooks before you started working with CAIR?
21. Do you think any kind of training would help people use the software more efficiently?
22. Is there any other software system you would prefer besides QuickBooks?
23. What are things that you require your accounting software to do?

Questions about Errors

24. Of the data that you enter when you enter it into QuickBooks, are there some common errors or problems that can be made or are made when entered into QuickBooks?
25. How many errors, in a percent do you say you have?
26. About how many entries or accounts do you have in QuickBooks?

Questions about Contact With Community and National Branch
27. In your accounting perspective do you ever make contact with CAIR National?
28. Do you ever send reports back to the community?
29. Are requests for forms or data output requested frequently, or not so frequently?
    a. *Follow up:* How many would you say a month?

Questions about Archiving and Account Tracking
30. For your QuickBooks database is there a backup procedure?
    a. *Follow up:* Are those backups made after every time you input data?
    b. *Follow up:* How far back do your backups go?
31. How are the accounts tracked?
32. In regards to your membership, do you get a membership number from CAIR National or CAIR-Seattle?

Questions about Data Storage and Access
33. Is centralized data storage is really important?
34. Would you like to see these people trained, at least minimally, in using all of the software applications?
35. Would you like to be able to access the information over the Internet after they are in the new office, or do you think it would be better if people went to the office to do their processing?
36. When you work, how do you get the information?
    a. Is it mailed to you?
    b. Dropped off?
    c. Do you work at home?

Mohammed Bilal Khan Interview Transcription:

Introductory Questions

Ryan: What exactly is your role at CAIR? What do you do there?
Mohammad: I specifically maintain their accounting system. Which is QuickBooks for now. And uh, um, I understand that they are going to have more systems, like a payroll system added to it. But, QuickBooks as it is right now cannot handle everything.
Ryan: Is it inefficient in what it does?
Mohammad: Well, you know, the needs that they have right now is very limited. It's not as if it is a big organization and it needs a lot of stuff. For now quick books can handle it, and, for what I see for the next 5 years it can handle it. Cause the amount of information that they are generating right now is too little.

Ryan: Too little to require a bigger system?
Mohammad: Yeah.

Ryan: Do you have an official position or a title for what you do?
Mohammad: No. I am not on their roster, you could say. I am just as a volunteer.

Ryan: How long have you been doing the basic QuickBooks accounting?
Mohammad: Uh, less than a year.

User Specific Task Oriented Questions

Ryan: Within in your position of doing the QuickBooks, like, what are your specific tasks that have been asked of you from the organization?
Mohammad: Um, anything to accounting. Fundraising, you know, that they money is collected or properly recorded, um, and um, the receipts that go out. Accounts relievable, accounts payable. Plus, then QuickBooks has this option to maintain your donors, list of donors. Address of donors and stuff. Used for sending newsletters and stuff. You know, the address and names are in there so you can draw that and generate a letter or something. You know, so it can do multiple things.

Ryan: When you are generally working with QuickBooks, what is it you are generally doing? Is it inputting data, generating forms?
Mohammad: Everything. Data and if you have designed the forms, it comes with the generic forms, so you might have to tweak it here and there, um, certain columns that are not there, you might like to bring in a certain column. So, once you have done those forms, you don't have to go back to those again. Unless you want to change something. The same goes for the letters. A donational letter, or receipt letter that says you have made a donation of x amount of money for the whole year. So, um, its already there. You do it once and you don't have to do it again. Same goes for 1099s if you want to send it to a corporation. Those are all designed and built in. So, you do it once and you don't change it again.
Ryan: Then those forms are one time created, like you said?
Mohammad: No.
Ryan: It's not very frequent that you change them?
Mohammad: No, you don't frequently change them. No.

Aaron: Do you ever get any forms from the national body of CAIR to use within QuickBooks?
Mohammad: Well, uh, so far we haven't received anything. So, it's kinda an independent item. They run their show, we run our show. We could have picked any other accounting software and I don't know what they are using. It's more or less independent. They do share data, I suppose.

Ryan: Besides QuickBooks, are there any other tools or programs that you use to do your tasks for CAIR?
Mohammad: Um, not really. No. Unless, the regular Microsoft Office Suite, that. Um, plus, I mean, I have used, um, something like, um OCR software. Because you get a form or a

spreadsheet and it is typed, you don't want to put it in again. But, basically Microsoft Office does what I need. Because you can download stuff from QuickBooks to Excel, you can upload from Excel to QuickBooks.
Ryan: They work well together?
Mohammad: Yes.

Questions about QuickBooks

Ryan: How often are you using QuickBooks to input data or to output data?
Mohammad: Currently, the way it is right now, it's like whenever. The data that we have right now, is like, so insignificant that you don't want to do it everyday. So, uh, I usually do it once a month.
Ryan: So, you just wait until you get like a month's worth of data then take like a day or so and put it all in?
Mohammad: Yeah, exactly. I usually wait for the bank statement. Then I know what the activity was and then I go searching for the records the checks, who did we write it to. And the payments that came in, who paid it. You might talk to Rami.
Ryan: We're in process of doing that.
Mohammad: So, he's my contact. Michaela or Rami. Michaela gives me the petty cash stuff, so I put that in. Usually once a month.

Aaron: Are there things that you have quarterly or yearly deadlines that you need to meet to send to the government or the national branch of CAIR?
Mohammad: Uh, there might be some. But I haven't done any of them yet. But, I am sure that there is something that you need to provide to the state. Being a nonprofit organization we need to do that. So, I don't know I have never done any account for a nonprofit organization, so I am not aware what kind of forms they need. There are some forms that they need to get to the state. It's just a state form. It is just one of those things, like, and income tax form. You do need to send it to the state.

Ryan: Of the tasks that you do that is time consuming or that you find exhausting? You mention that you do the entering in one day. Is there one thing in that day that you find time consuming or exhausting?
Mohammad: I wouldn't say that. I would say fundraisers. Hectic. Tons of checks and those need to be loaded in and maybe the address needs to be entered in. Cause, it depends if they are an existing donor. That's easy. If they are new you need to punch in a whole address. So, you need to setup the person or which is an account. It's needs other stuff also.
Ryan: That account information that you talk about, if it's a new person that is all stored in QuickBooks then?
Mohammad: Yes. Yes. It has all the information about the person or maybe a corporation or maybe a company or whatever. So, you need, name, address, and whatever the other stuff is needed.
Ryan: When you have a fundraiser like that, do you try to get the information input soon after the fundraiser?

Mohammad: We would like to do that. But, we had one fundraiser and I had to key it in. Um, which was around 3 or 4 months later. So, whoever kept the records before didn't keep check copies. So, we have to get the check copies from the bank and type it in.

Physical Data Storage Questions

Ryan: Do you make physical copies of the checks to keep for the records of CAIR?
Mohammad: Yes.

Ryan: How are those stored? Are they stored in a binder or a folder?
Mohammad: Currently they are stored in a folder with the statements.
Ryan: So, like monthly?
Mohammad: Monthly, yeah. The activity of the thing, so it's all stored in. It would nice on a hard disk. So you can easily search and stuff.
Ryan: So if you had them scan into a PDF or something like that?
Mohammad: Yeah.

Questions about User Suggestions and Problems

Ryan: Is there something of the tasks that you perform that you think could be made easier or more automated that it is now?
Mohammad: From past experience, I know that banks could provide you all the information that is on the check. The name, address, account number, and all that kind of stuff. The amount written on the check, the check number. They can provide you on a spreadsheet or on a downloadable file. Then we key it in. They have a way, because it's an account and they have it somewhere, cause it might. I was working with Citizens before and that's how, our checks went to the bank directly, they never came through the company. So, all they provided was a data file that had all the information that was on the check. And, it was loaded up and nobody had to key it in.
Ryan: All taken care of in the file. Now it's like, does it give you the check number, the amount, when it was cashed? Is that basically what it gives you now? From the online?
Mohammad: Yeah, not even that. It won't even be a file file. If you ask for a file it will give a deposit date, check number. I doubt that you'd even get the check number too. Those fields that you usually get are the date and the amount of the check. That's about it.

Ryan: If there is one thing that you would like to change or improve of the things that you do for CAIR, what would be one or a couple of the things that you would like to change or improve?
Mohammad: I'm too new at it. I don't know exactly. Nothing that would stand out. I don't know.

Ryan: Of the way that data is stored and collected and processed, what do you see as some of the hindrances or problems that flow, how it gets processed or things like that?
Mohammad: So far we've had no problems because the data is very small. Minimal. So, no problems accessing data. But, I'm sure as years go by we'll have plenty of them and the system will get slower and slower. So, I don't know how much data this corporation will

generate. So, and it depends if it is a single user accessing data. They'll be much better than multiple users. So, it depends on how fast it grows and much access people are going to have access to this particular database. So, if there are 5 to 10 people accessing this data it will get bogged down and really slow. Maybe, as far as it is right now, it's fine. But down the road it maybe different.

Aaron: Do you ever have to get contact from the Excel spreadsheets that CAIR-Seattle uses?
Mohammad: Contact information? What do you mean?
Aaron: To contact a company or something. Or, do you only ever deal with what is in the QuickBooks?
Mohammad: Well, uh…
Aaron: Like if you wanted to look up a member, or do you ever even need to look up a member?
Mohammad: In case if… give me a scenario, like in searching.
Aaron: Like in the role that you've played so far, have you ever had to check out the Excel spreadsheets that Michaela keeps to find a member's information to call them or anything, so far?
Mohammad: Not me. But Michaela does. I understand that Michaela might ask me if I have this member's information, I know this guy paid it then and do you have his telephone number, address. I might have it and she might not. So, the information flows this way, from Michaela to me. Either way, it deepens on what is asked. Because if she is looking for somebody and I have it and she doesn't then she'll ask me. But, I wouldn't go ask her, because I have no need for it.

Questions on how the QuickBooks Software Operates

Ryan: When using QuickBooks, have you found any problems with the software that hold you back or other things like that?
Mohammad: Payroll. The way it is designed, you have to subscribe to the payroll tables. Like the deductions that you have on your payroll. So, you have to subscribe to QuickBooks to get those tables. Without subscribing to those tables, you cannot use the payroll.
Ryan: When you say subscribe, what do you mean?
Mohammad: Subscription to updated tables. Every year they will send you updated tables. Like the deduction percentages, SDI. Those things you gotta subscribe to before you can use that function. If it is a big function and it has good use, as you would have more employees you would like to use that. Currently, we are using it, not the payroll system, since it is not built in and we don't subscribe to it. But, we are entering the salary information in there.

Ryan: Do you know which version of QuickBooks you are currently use?
Mohammad: The most recent one.
Ryan: Is that a license that you purchased?
Mohammad: It is the license that I purchased. I purchased it under CAIR.
Ryan: You were reimbursed by CAIR?
Mohammad: Yes. I will be. <laughter>
Ryan: Was it a special kind of license?
Mohammad: It is a nonprofit version of QuickBooks. It is not the standard version.

Ryan: Not like the version on the shelves?

Mohammad: No, well you can buy it off the shelves, but it is specifically designed for nonprofits. It comes with other stuff. Geared towards nonprofits.

Ryan: Have you used QuickBooks a lot before you started working with CAIR?

Mohammad: I have used it before, but not a nonprofit version. Just a regular version and it was years ago when the software was very simple. Now it's much more integrated and it does lots more than before, very little help. <laughter>

Ryan: So, the ease of use is pretty steep?

Mohammad: I would say, it's not steep. But you have to use it once to get familiar with it. It uses the accounting terms and if you have been working with a nonprofit and you know what it means, I have never worked with it, so I have no idea when they are talking about it in that sense. I have no idea, I have worked all this in a corporation for profit in when they talk about accounts and general ledger of accounts, I can relate to it as in a for profit organization. I can never relate to it as a nonprofit. I mean, their account structure is totally different. It's not very steep. Yeah, you got to get familiar with it.

Ryan: Do you think any kind of training would help?

Mohammad: Oh yeah. If you could get one of those courses. Not the basic, basic. Maybe an intermediate course or advance. Because, it's very simple to play around and learn.

Ryan: Is there any other software system you would prefer besides QuickBooks? Or, is QuickBooks the way to go?

Mohammad: For the organization that is so small I think that QuickBooks is sufficient enough. All other software would be tedious. Like Peachtree, one step above. It's too modular, too bulky, and nothing comes standard. Well, some things come standard. Plus you have to do a lot to setup. This thing out of the box it's sets itself up.

Ryan: What are things that you require your accounting software to do? Obviously you would like it to do payroll, keep track of your donations, be able to output forms. Is there anything else, maybe things that QuickBooks can do but has the feature to do. Are things that you would like it to do?

Mohammad: Well, I haven't found anything that it cannot do. So, like I said, the needs for a nonprofit organization, and this thing is designed for those folks, it can generate letters for fundraising. It can have grants. Like, pledges, it can track that too. It pretty much can do everything. I don't think that there is anything so far. I haven't found anything that it is not capable of doing, so far.

Questions about Errors

Ryan: Of the data that you enter when you enter it into QuickBooks, are there some common errors or problems that can be made or are made when entered into QuickBooks?

Mohammad: Addresses. Cause, that is a generic problem in any software that you keep track of. Somebody enters the address differently and the system cannot match it together. You might have 4 accounts for the same name because the system things that there are three different or four different accounts. So, it's also the same way. You might have one account open with how the names are, you might have spelled it differently and on the other account

you might have spelled it differently. So, you will be carrying duplicate accounts all over the place. So, if there was a way to standardize addresses. Because I know that post office has a disk, at least for Washington state or the whole country, that you can see all the address for the state. Some how standardize the address and it knows that it is the same guy. ABC that you have it is the same as EDFG and it just merges it together. That was a big problem that I had, because when you are looking for someone who owes you certain money and he might have paid it in another account and we send out a letter to him and saying, you haven't paid it. And he is like, I paid it. But, you don't know that because it is located in a different account.

Aaron: Are there any other causes of accounting errors? Where someone says they paid and they say you've paid too much?
Mohammad: Usually it is the keying errors, not something that the system is doing wrong or recording it differently. It is just applied to the wrong accounts.
Aaron: From the paper to the machine you don't get a lot of errors besides addresses?
Mohammad: It's the human aspect of it.

Ryan: How many errors, in a percent do you say you have?
Mohammad: There haven't been many that I can find, but I would say a couple of percent.

Ryan: About how many entries or accounts do you have in QuickBooks?
Mohammad: Donor accounts. I would say, I don't know. Around 500.

Questions about Civil Rights Involvement

Ryan: We know that CAIR is pretty involved in the civil rights aspect. What is your role as that pertains to aspect of CAIR? Or, is that something that you don't necessarily deal with?
Mohammad: Yeah, I don't deal with that. Or, I have very little knowledge of that aspect. I am all for it, you know. Civil right. I am focusing on the accounting needs.
Aaron: I thought that she said at some point that he was some kind of civil rights figurehead.
Mohammad: Who, me?
Ryan: Yea. I think that is why we had that question in there.
Mohammad: Maybe somebody else. <laughter>
Ryan: You have very little to none interaction with CAIR National?
Mohammad: I have been a member for a long time with CAIR National. But the interaction between CAIR to CAIR?

Questions about Contact with CAIR National and Data Flow

Ryan: In your accounting perspective do you ever make contact with CAIR National?
Mohammad: No. I don't. No need to. Unless we are paying or they are paying us. That is about it.

Ryan: One thing we would like you to do, is draw a data flow or a hierarchy of information within the organization. How you see it. So we can get an idea on how you view the organization. Maybe a personal perspective, or even how the data flows within the

organization. You have mentioned that you get the checks than you input it into QuickBooks. If that all makes sense.

Mohammad: I'm trying to think. Ok, the data flow. How would it flow? I get it from Rami. This is all so new, I have one contact and that is Michaela or Rami and the information gets to me through Rami, so far. So, I mean, that is all I get, the statement and the copies of the checks or whatever that needs to be input. So, I don't know how to draw that. The information flows from me to Rami, Rami to me, or me to Michaela.

Ryan: More triangular.

Mohammad: Yeah. Cause Rami takes care of the accounting for budgets.

Report Requests

Aaron: Do you ever send reports back to the community?

Mohammad: No. I send them back to the person that the request came from. Michaela might have asked for a certain thing.

Ryan: Are requests for forms or data output requested frequently, or not so frequently?

Mohammad: Not so frequently.

Aaron: How many would you say a month?

Mohammad: Maybe once. Unless, maybe, once a month.

Backup Procedures

Ryan: For your QuickBooks database is there a backup procedure?

Mohammad: A floppy.

Ryan: It all fits on one floppy?

Mohammad: So far is has. I got on hard drive two partitions so I put it on the other partition in excess to the floppy disk.

Ryan: Are those backups made after every time you input data?

Mohammad: Every time.

Ryan: How far back do your backups go?

Mohammad: No archive. Just the one previous.

Account Tracking

Ryan: How are the accounts tracked?

Mohammad: By name. It can be setup by an account number.

Aaron: Do you use that now?

Mohammad: No. We can if we want to.

Aaron: In your perfect world, would you?

Mohammad: I would. Because all the names are so common. I mean, look at my name. It is so common.

Ryan: In regards to your membership, do you get a membership number from CAIR National or CAIR-Seattle?

Mohammad: CAIR-Seattle started doing it. Yeah, I noticed that some of them had it some of them didn't. So, that could be the account number.

Ryan: In the perfect world.

Mohammad: Yes. Some accounts have it some of it done. It is another field that is input when you setup the account. I stuck that number in there, but some accounts don't have that. It would be better to have it.

Ryan: We only ask because we are looking for a unique identifier for accounts, so that they might be easier to track.

Mohammad: I don't know how Michaela is tracking the members that she has. If she has a spreadsheet or a Word document, I don't know how she is tracking them.

Ryan: So, you have never seen the data the she has?

Mohammad: No I haven't. I would rather have her use the QuickBooks, so that whenever she updates that the QuickBooks gets updated also. Or, if there address change. People move all the time and then we won't have the current address. And if she has it then QuickBooks doesn't have it and if QuickBooks has it then she doesn't have it.

Ryan: If there was some way that you would be notified when a change was made on her end. Would that work too?

Mohammad: Well, I was wondering about what does she do? Sending out letter, or asking for pledges payments. QuickBooks can do that and I don't know that she can use that part, so I intend to talk to her about that one of these days.

User Vision of Organization

Aaron: How would you like to see the organization of the Seattle CAIR?

Mohammad: Like the information from the systems?

Aaron: It could be information. Information, anything that is coming out. How would you like to see CAIR look, at least in Seattle?

Mohammad: The way, I don't know how it is structured now. It think it is like pyramid style. The information flows top down. Like I said, I am too new to the organization to know anything about that. But, I would rather have it horizontal, kinda.

Ryan: When you say it is pyramid style, is that with Michaela at the top?

Mohammad: Um, no. I think that there is another gentlemen, Ibrahim. And he has some other members that are below him.

Ryan: Is he the director?

Mohammad: I think so. Like I said, I am unfamiliar. And he has some directors underneath him, Rami is underneath him. I don't know where Michaela fits in. But I know that Rami is one of the directors.

Ryan: But, overall, your main contacts?

Mohammad: Rami and Michaela. I don't have any idea who is around them.

Aaron: And you said that you would like to see it horizontally?

Mohammad: Yeah, because then I would rather have all these folks having access to the system. They could easily run reports, easily look at any data they want.

Aaron: You just have the system up top?

Mohammad: Because the reports are rare, somebody has to run them or look at them. It doesn't do any good if it is sitting in one person's desk.

Aaron: Centralized data storage is really important?

Mohammad: Oh, right. Definitely. Just to look at somebody, or what is the financial situation of the institution today. You don't have to call somebody and have them call somebody else and then get the information two days later.

Aaron: You would like to see these people trained, at least minimally, in using each of the software applications?

Mohammad: Just point for running for reports. QuickBooks has the option of limiting access to each individual.

Ryan: Like a users account? So, you login every time you use QuickBooks?

Mohammad: Yeah. Yes. So you can give access to a payroll person to just payroll.

Ryan: Or give access to just make reports?

Mohammad: Yes. It has that capability, but it would be nice. But, that requires a multi-user.

Ryan: A single station that users can connect to?

Mohammad: Yes.

Aaron: Would you like to be able to access this over the Internet after they are in the new office, or do you think it would be better if people went to the office to do their processing?

Mohammad: No. Currently they are all volunteers. It would be ideal to have it over the Internet. That would be really good. You don't have to be in the office all the time.

Ryan: Favoring remote access over building access?

Mohammad: Exactly. Michaela being there she is the only one that is pay rolled. She might have the whole system on her desk with folks coming in over the net and accessing the data.

Questions on how Information is Obtained

Aaron: When you work, how do you get the information? Is it mailed to you, dropped off? You work at home?

Mohammad: I call Rami and ask for it and he hands it to me.

Ryan: What do you get?

Mohammad: Copies of checks, statement, and the payments that came in. And if there are particularly, if he paid checks, what was he paying for. The checks that were deposited, what were they for. Were they for pledges, general donation, or some special project. I need to know that. And he just gives me a bundle with all that in it.

Ryan: Of that stuff, you just file it away when you are done with it?

Mohammad: Once I record it, balance my statements for that particular month.
INTERVIEW END

Questionnaire of the Council of American-Islamic Relations Director

Questionnaire issued to: Rami Al-Kabra (Director)
Issued by: Graham Ford

Miscellaneous: This questionnaire was issued because a time conflict arose between the interviewers and the interviewee. A meeting was scheduled and had to be cancelled due to time constraints by Mr. Al-Kabra. This questionnaire created and used as an alternate method to get the questions answered that we had prepared to ask during the interview.

Goals

- To assess the economic resources and fundraising capabilities of CAIR-Seattle.
- Find out who is in charge of how the finances are spent.
- List CAIR-Seattle's spending priorities.
- Find out how important information management is to the organization.
- Get an idea of what the organization is willing to spend on an systems solution.

Rami Al-Kabra Questionnaire Responses

1. How would you describe your fundraising model?

   a. Very much dependent on the grassroots community. Typically funds are gathered at an annual fundraising banquet where national speakers, community members and public officials are invited.

2. Are there any grant opportunities that could be pursued for the funding of a computer information system?

   a. Don't know.

3. How are spending decisions made?

   a. At the Board level based on a Budget

4. Could you please list CAIR-Seattle's spending priorities?

   a. Administrative operations

   b. Community Relations

   c. Civic Education

   d. Media Relations

5. Where does information management lie among your current list of spending priorities?

   a. Not a high priority as we have a small office

For the following questions, imagine a computer system that solved 100% of your top information management problems related to finances, fundraising, and membership information.

6. If you were to give an estimate of the funds that could be raised up front for such a system, how much would that be? $2000? $5000? $8000?

    a. 5,000

7. For the same system, what level of recurring costs would be sustainable? $100/month? $200/month?

    a. 100

8. Given that the organization is growing rapidly, what would you forecast your answers to 6 and 7 to be a year from now?

    a. Probably close to the same

Survey for Council of American-Islamic Relations Members

Survey available to: All CAIR-Seattle members in attendance at their 2nd annual fundraising banquet on Saturday, May 8th.
Survey administered by: ISAT member Laila Almounaier

Miscellaneous: This survey was intended to better serve CAIR-Seattle by providing them with needed information about who has the available skills to help with implementing a new information system. However, due to the magnitude of the event and time conflicts by ISAT team members the response was less than anticipated. Data was colleted for a few participants and those surveys will be passed on to CAIR-Seattle for further review. The survey that was administered is below.

Goals

- To administer a survey to current CAIR-Seattle members.
- Inquire about skills that members currently have.
- To find out if current members would be willing to help CAIR-Seattle in the future by volunteering their time to the organization.
- To provide this information to CAIR-Seattle for uses other than what ISAT primarily intended.

Survey

See next page

CAIR-Seattle

Volunteer Survey Form

CAIR needs *your* help to serve the community. Offering your time is just as valuable as donating money. Don't hesitate to help out, even if it is only an hour or two a week. *Jazakum Allah Khair!*

Personal Information:

Last Name First Middle	☐ CAIR Member ☐ Not a CAIR Member
Street Address	Occupation
City State Zip Code	Phone: E-mail:

Are you willing to volunteer some of your time to help CAIR?   ☐ Yes   ☐ No

If so, how many hours per week can you offer? _____

What kind of work are you willing to help out with ? (Circle all that apply)

Office work (phoning, mailing…)   Contacting politicians   Outreach and PR

Coordinating with media personnel   Fundraising   Assistance
with voter registration

Legal consulting   Newsletter articles, letters… Monitoring the
media regularly

Helping at events   Word processing/Data entry
     Other:_____

On a scale of 1-4 please circle how you rate yourself in the following computer skills?

1-NEVER USED   2-BEGINNER   3-INTERMEDIATE   4-EXPERT

• Computer networks	1	2	3	4
• Web page authoring	1	2	3	4
• Database applications	1	2	3	4
• Operating system support	1	2	3	4

• Computer hardware support   1   2   3   4

Circle the computer technologies that you are VERY familiar with using?

• Windows XP   • Windows 2000   • Windows ME   • Unix/Linux   • C/C++

• Java   • ASP.net   • JSP   • PHP   • Perl

• Visual Studio.net Technologies (C#/J#, etc…)   • Excel   • PowerPoint

• Outlook   •Access   •Word   • QuickBooks
•Other:_____

Appendix B: Feasibility Study

Introduction

In this feasibility study Information Systems Analysis Team will be covering some of the problems that we have found within the Seattle Chapter of the Council on American-Islamic Relations (CAIR-Seattle), "the organization," as well as some of the opportunities for solutions to these problems. The study will discuss the purpose for the analysis, the current system and the areas for improvement, benefits of the new system, and finally if the proposed system is technically, economically, or operationally feasible. A problem statement will be provided to better focus the scope of the feasibility study.

Client Description

The Council on American Islamic Relations (CAIR-Seattle) is a nonprofit organization established to promote an accurate image of Muslims and defend their rights in the United States. CAIR-Seattle is a recently formed chapter that started about a year ago in Washington. They currently have one paid employee along with five board members and many volunteers. The chapter's annual budget is projected to be a little over $200,000 this year.

Problem Statement

During our analysis we conducted three interviews with two key individuals within our client's organization. The data collected during the interviews revealed a number of information-related issues. Some of these issues that we have found are listed below. To provide you with a better understanding of these problems, we are defining them here by their terms because they will be referenced though out the systems analysis and proposals.

- **Data collection**

      o CAIR-Seattle's database does not have any required data fields and is lacking unique identifiers for the records that they keep. This means that all data is just entered the way that it is and cataloging is inconsistent from person to person. There might be extra, non-required fields in one data set, while another data set might be lacking these fields.

- **Data redundancy**
  - o Because of different computer applications and a lack of training on these applications, there is redundant data contained in multiple places within the CAIR-Seattle information system. This redundant data is difficult and time consuming to maintain; any attempts to maintain information integrity are very difficult since all of the information is separated over many files within the system.

- **Information access**
  - o CAIR-Seattle has multiple sources of information but access to this information is limited by lack of software training and also by physical location. Another user cannot access the information that is stored on a different computer, unless he/she is in possession of that computer. Also, due to the lack of unique identifiers on records, data inaccuracy and inconsistencies can make finding records difficult and time-consuming.

- **Information storage and archiving**
  - o All of the current information that CAIR-Seattle uses is stored on two computers. Access to data storage is limited to these computers, thus information access is limited to one user at a time. There is no standard archiving practice in place; one user might archive on a regular basis while another might not archive at all. Also, there is no current system in place that would automatically archive the information for them.

- **Information dissemination**
  - o The current way that information is disseminated in CAIR-Seattle is at times very troublesome for the user. Information may be difficult to access and at times the users are not trained in how to access or create the proper listing of information that they need.

- **Information accuracy**
  - o Because of redundant data, incompatible file types, and a physical separation of data it is difficult to maintain information accuracy. There is no method in place to cross check for data entry errors and to verify information accuracy.

- **Lack of human resources (all but one staff member works on a volunteer basis)**
  - o With only one full time staff member human resources are very limited. This full time staff member performs a large majority of the work and because of this, some tasks are never completed as time cannot be found to complete them.

- **Lack of standards in data gathering**
  - Information that is collected by CAIR is not defined by a proper and unified standard. One member of CAIR might gather information in one manner and another member might collect it in a completely different fashion.

- **Inadequate training**
  - CAIR-Seattle is utilizing many pieces of software while their depth of knowledge is not very extensive on some of them. They have limited proficiency on the software, but they realize that the software may have much greater unacknowledged possibilities.

- **Process inefficiencies**
  - Many of the processes that they use currently could be streamlined into fewer steps done by the user. Some processes, such as logging of phone calls, currently require more steps than necessary to complete.

- **Lack of a data recovery system**
  - Currently CAIR-Seattle does not have a backup system for much of their organizational critical data. If there was a catastrophic malfunction and all data was lost, there would be no backup system in place to recover the lost data.

Based on our data analysis activities we identified what we feel to be the root causes or problem(s) associated with those issues.

We feel that there were many problems and issues that revolve around the data collection, information storage, and information retrieval. Many of the above listed issues stem from the direct lack of sufficient human resource (1 full-time staff), process inefficiencies, and a lack of software training.

Of the issues that we found, the Information Systems Analysis Team will be focusing on how CAIR's existing software applications interact and how the information stored in those applications relate.

Purpose

The purpose of this feasibility study will be to analyze the current system within the scope of technical, economic, and operational achievability. From this, the Information

Systems Analysts Team will provide this study to CAIR-Seattle to better help them make an informed decision on whether to proceed with this proposal.

Overview of the Current System

CAIR-Seattle's current information system mainly revolves around the correspondence processes between itself and the Washington State Islamic Community. CAIR-Seattle can be contacted by phone or e-mail. As shown in the Data Flow Diagram (see Appendix D), the data for phone correspondence is stored in a spiral notebook and the e-mail correspondence is stored in Microsoft Outlook. These two records are then combined in order to keep track of civil rights violation cases in a second process. At the end of the year, the data of these cases is sent to CAIR National in Washington D.C.

Also shown in the diagram is the membership data that CAIR National sends to the Seattle chapter that is used to keep track of current members and to remind them of events or request donations. The correspondence and recording of cases processes are currently being handled by one person. Problems in the current information system occur within the correspondence and storage of case data processes. Further details about the problems are explained in the next section.

Problems and Opportunities

Data Storage:

CAIR-Seattle suffers from dire disarray in data storage, which makes for inefficient data retrieval. Forms are kept in Microsoft Word and the following information is stored in muddled Microsoft Excel spreadsheets:

- Donor information
- Chapter members information
- Partners information
- Political and media contacts
- Attorneys' contact information
- Fundraising associates information
- Data activists information
- Islamic community centers and mosques

Financial information is stored in Intuit's QuickBooks and scheduling is done with Microsoft Outlook. Michaela, the only paid staff of CAIR-Seattle, admittedly does not know how to use these applications to their fullest, and volunteers who help work with the data cannot be expected to know them either.

Data Entry:

Beyond the method in which the data is stored, another problem is presented in the manner in which it is entered. All data is input using a laptop or personal computer, mostly by Michaela or by volunteers to whom she delegated the task, with the exception of financial data, which is tracked more or less exclusively by Mohammad Khan. Using a laptop is convenient for working on the go and moving around the office, but the standard 4200-rpm hard drive that most laptops are equipped with is nearly one half the speed of a desktop PCs hard drive. This lack of speed makes it inconvenient to load large databases to view or add

contact information, which leads Michaela to use a notebook to take notes, which must then be re-entered into the computer later.

Due to her many responsibilities, transferring the notebook to the computer becomes backlogged and often must be handled by volunteers. When this occurs, the paper to digital transfer lends itself to data errors or loss.

Some of the things that we will be able to build off of are the fact that the organization knows what types and how much of the information they want to be stored. They also have a very good idea as to the scope and amount of information that they will be keeping track of. For example, the organization's financial advisor tracks only about five hundred donor accounts in their QuickBooks software.

As it has been mentioned, their current infrastructure for data input is very poor and could be improved upon. But, knowing what types of information and the amount that needs to be stored will enable a more efficient system design. Also, it should be noted that by having the organization in possession of a high speed internet connection and computers to be used for organizational business leaves many options open, due to the fact that they have current hardware in place for their data collection. New hardware, or add-ons to current systems, may later be recommended, but we will not overlook the opportunity provided by hardware already in place.

Benefits of Proposed System

Our goal is to examine the aforementioned problems and explicitly identify the information requirements of our client. We intend to investigate hard data, interview various organizational members, and analyze what information users need to perform their jobs effectively. After gathering the data we will prepare a systems proposal that provides cost/benefit analyses of alternatives and recommendations.

After identifying CAIR-Seattle's information requirements our goal is to provide them with an opportunity to rebuild their current data structure. The benefits of the new system will allow better tracking of new and current clients. Using a reliable database, CAIR-Seattle will have the opportunity to create effective relationships with clients, manage data efficiently and track financial securities. Our objective is to develop a set of standard procedures that will allow the employees to effectively perform their tasks. Our intent is to help CAIR-Seattle enhance the capabilities of their technology infrastructure as well as the organization's information flow. Below is a brief summary of how the systems will be improved as well as how organizational objectives will be affected.

System improvements:

- Streamlining information data collection, entry, storage, and retrieval by removing unneeded steps
- Improving data accuracy
- Reduce data redundancy
- Provide information about training for their current software packages
- Moving information into a central storage location/server for centralized access
- Improving the integration of software systems and the data they contain

Organizational improvements:

- Improved information access by authorized users
- Streamline procedures for account maintenance
- Increased office efficiency

Technical Feasibility

CAIR-Seattle's current technical resources are somewhat limited. They are currently working off a laptop and other personal computers from home. They do however have access to a high-speed Internet connection, as well as some personal and nonprofit software licenses that they are currently using to perform their daily tasks. Even though their technical resources are limited, we do believe that some of them are sufficient enough for the new system. Add-ons will need to be looked into based on the assessments that are made about implementation of a new system. These add-ons may be a simple piece of hardware for backup or as large as a server for central data storage. Other unavailable resources that may be needed for a newly designed system can be upgraded from their current system to meet the needs of the technology requirements. Depending on our different recommendations and their choice of implementation, other resources may need to be acquired to produce optimal results from the proposed system.

Economic Feasibility

The Seattle chapter of CAIR is funded through a donation process; no funds are sourced from the national organization. Donations are received as one time donations through fundraisers. In addition, many members choose to make regular donations via a variety of payment methods. Thus, the framework exists to find funding for an initial investment in an information system and then fund regular maintenance over the long term. In addition, as a nonprofit, there exists the opportunity to apply for grants to help fund a future system.

Also, in terms of the cost for time taken to obtain data for this study, it all comes out of personal time for the volunteers and out of the workday for Michaela. Therefore, caution will be made to only require needed interviews and information gathering from Michaela and volunteers. The analysts' are providing their time and services free of charge to the organization.

With respect to the cost of hardware this value could range from a value in the hundreds of dollars to one in the thousands of dollars. This all will vary on the implementation that is chosen by CAIR-Seattle. Small hardware purchases may be needed to implement specific parts of the proposal but some larger hardware purchases, such as servers and additional computers, would require a larger financial requirement. With this said, care will be taken to find solutions that can be implemented with current funds and also alternative solutions will be offered that would require fundraising to implement properly.

The software that CAIR-Seattle currently uses has been purchased for the exclusive use of organizational business. Other software may need to be purchased and the costs of these packages may vary. The cost could range from the hundreds of dollars to the thousands. Licensing fees and special software for nonprofit organizations will be looked into to find the most cost effective way to provide the software that they might need for the proposed system. However, some software packages do not offer a nonprofit organizational price, so retail price will need to be paid in these instances.

To guide research into potential future expenditures, a tentative list of spending priorities can be enumerated as follows:

1. Administrative Operations
2. Community Relations
3. Civic Education
4. Media Relations

Information management would fall within administrative operations; however it is only a small part of this item. As seen in these priorities, their funding is divided among a variety of purposes. When asked for an estimate of what could potentially be raised and committed to an information system, the amount of $5000 was given for initial investment costs. This amount makes this project economically feasible.

Operational Feasibility

CAIR-Seattle currently operates mainly with volunteers and one fulltime employee. A typical volunteer's commitment varies depending on events or projects that are forthcoming within the organization. Board directors, as figureheads of the chapter, are more dedicated volunteers. However, board directors do not have an organized advisory committee to help with their decision-makings. Some board directors also cover additional positions that possibly could be assigned to other employee(s).

The full time employee fills the managerial position. Nevertheless, the manager does not have other employees underneath her to manage. The following are tasks that could be delegated when the new system is installed:

- Data entering
- Maintaining and updating of databases
- Maintaining and updating of the contacts list
- Updating the events calendar
- Answering phone calls
- Coordinating media relations
- Producing press releases
- Membership drives
- Maintaining meeting minutes
- And coordinating civil rights actions

If the manager was able to delegate those tasks to one or two other qualified employee(s), CAIR-Seattle can accomplish the following:

- Reduce data entry errors

- Reduce redundant data storage

- Speed up work processes

- Keep track of all information within the organization as well as affiliates

- Increase the ability to be informed and proactive

- Ultimately provide a quality service to the community

After the system is recommended, a decision will be from the organization on whether or not to implement the system. From the interviews that have been conducted it has been shown that a new system would be a benefit for the organization and they are seriously considering a system that will help them with their current information problems. It will be important to find either paid staff or volunteers to maintain the system once it's implemented. If there are updates or other facets of the system that need maintenance, they can be taken care of by a designated individual who is assigned to this task within the organization.

The system, if implemented, will be used as their main information system. They will have their old system that they use currently, but any improvements that are made to help streamline the process will be taken over the current processes of data management. If the system is simple to use and provides continual residual benefits to the organization the use of the system will be very plausible.

Limitations of Study and Assumptions

There are some limitations to this study based on some uncertainties that lie within CAIR-Seattle. Some areas of concern are with how much manpower will be acquired over the coming months. It has been mentioned that acquiring more manpower is high on the priority list for this organization, but the actuality of this occurring is uncertain. It is dependent on many variables that are not very clear at this point in time.
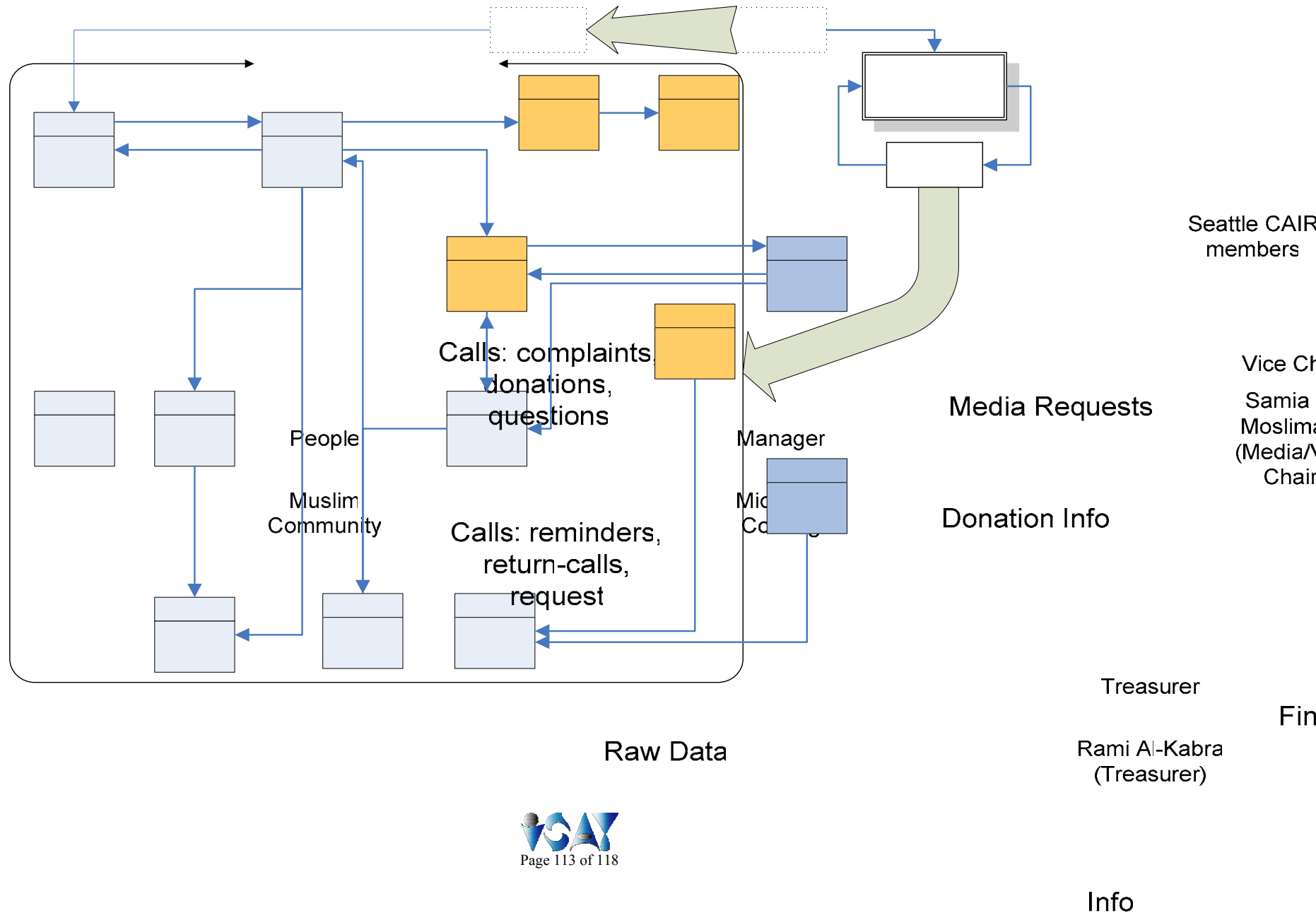
This study was completed based on the assumption that these new full time staff will not be acquired. This reasoning was taken for the fact that if a system is designed that requires more manpower than currently provided, they will not have the necessary human resources to utilize the system. Further certainties about their staffing situation will relieve this issue.

Conclusions

Based on the preceding information, this project is feasible. Some restraints will need to be placed as manpower and finances are in short supply but in high demand. This will not, however, stop or halt our advances to provide a system that will cover the selected issues we have outlined in our problem statement and throughout this feasibility study. We feel that this feasibility study lays out a practical and obtainable framework that we will be able to work within and help improve on the current system that CAIR-Seattle currently has in place.

Appendix C: Organizational Chart

Seattle CAIR
members

Calls: complaints,
donations,
questions

People

Manager

Media Requests

Vice Ch

Samia
Moslima
(Media/V
Chair

Muslim
Community

Mid
Co

Donation Info

Calls: reminders,
return-calls,
request

Treasurer

Fin

Raw Data

Rami Al-Kabra
(Treasurer)

Info

Appendix D: Data Flow Diagram

Washington
State
Islamic
Community

Payment directly or through Paypal

2

Membership Information

Receipt of Payment

Donate to
CAIR Seattle

Transaction Record

Reminders
Follow-ups

Caller
Information
Reasons for
calling

Transaction
Record

Contact CAIR-
Seattle Through
Phone or E-mail

Correspondence Records

CAIR-
Seattle

Members
Informatio

Membership D

Membership Data

Appendix E Additional Information About System Alternatives

System Alternative 2: QuickBooks Plan

Server – Dell.com

Module	Description	Product Code	Sku	Id
OptiPlex 170L	Intel® Celeron® Processor 2.40GHz, 128K/400MHz FSB	24CL1	[221-4262]	1
OPERATING SYSTEM(s)	Microsoft® Windows® XP Professional, SP1, with Media and NTFS	XPP1EC	[420-2119]	11
MEMORY	512MB DDR Non-ECC SDRAM, 333MHz, (2DIMM)	512N32	[311-3475]	3
KEYBOARD	Dell PS/2 Keyboard, No Hot Keys	PS2	[310-4822]	4
Monitors	Dell 17 inch E773 CRT color monitor (16.0 viewable)	E773S	[320-1582]	5
Graphics Cards	Embedded Intel® Extreme® Graphics	INT	[320-0428]	6
Boot Hard Drive	80GB EIDE 7200RPM	80	[341-0420]	8
Floppy	No Optical or No Floppy Drive, Filler Panel	N	[341-0425]	10
Mouse	Dell PS/2 2-Button Mouse	L	[310-4825]	12
Network Adapter (NIC)	Integrated Intel 10/100Mb LOM w/ remote wake-up	INT	[430-0554]	13
Removable Storage Devices	48X CDRW	CDRW48	[313-2369]	16
Audio Solutions	Integrated Audio	INT	[313-8170]	17
Support Services	3 Year Limited Warranty plus 3 Year NBD On-Site Service	W3YOS	[970-9772] [902-4780]	29
Mouse Pad	Mouse Pad	MPAD	[310-3559]	38
Purchase Intent	Purchase is not intended for resale.	NOT4SEL	[462-4506]	138
			TOTAL: $852.30	

Workstation – Dell.com

Module	Description	Product Code	Sku	Id
OptiPlex 170L	Intel® Celeron® Processor 2.40GHz, 128K/400MHz FSB	24CL1	[221-4262]	1
OPERATING SYSTEM(s)	Microsoft® Windows® XP Professional, SP1, with Media and NTFS	XPP1EC	[420-2119]	11
MEMORY	256MB DDR Non-ECC SDRAM, 333MHz, (2DIMM)	256N32	[311-3473]	3
KEYBOARD	Dell PS/2 Keyboard, No Hot Keys	PS2	[310-4822]	4
Monitors	Dell 17 inch E773 CRT color monitor (16.0 viewable)	E773S	[320-1582]	5
Graphics Cards	Embedded Intel® Extreme® Graphics	INT	[320-0428]	6
Boot Hard Drive	40GB EIDE 7200RPM	40	[341-0419]	8
Floppy	No Optical or No Floppy Drive, Filler Panel	N	[341-0425]	10
Mouse	Dell PS/2 2-Button Mouse	L	[310-4825]	12
Network Adapter (NIC)	Integrated Intel 10/100Mb LOM w/ remote wake-up	INT	[430-0554]	13
Removable Storage Devices	48X CD-ROM	CD48	[313-2365]	16
Audio Solutions	Integrated Audio	INT	[313-8170]	17
Support Services	3 Year Limited Warranty plus 3 Year NBD On-Site Service	W3YOS	[970-9772] [902-4780]	29
Mouse Pad	Mouse Pad	MPAD	[310-3559]	38
Purchase Intent	Purchase is not intended for resale.	NOT4SEL	[462-4506]	138
			TOTAL: $749.70	

Purchase from: newegg**.**com

D-Link 8-Port Broadband VPN Router,	**Model DI-808HV**	**$88.00**
Lexmark Multi-function printer, 19 PPM, 4800 x 1200 DPI	**Model X6170**	**$130.00**
25 Ft, Cat. 6 Patch Cable, With Snag-Free Caps, Black,	**Model 10X8-22225**	**$4.95**

Software

Purchase from: caliente.com

iWYWO - US 2 user initial purchase   **$50.00**
First time customers must purchase a minimum of 2 users.
Initial purchase includes the new high performance WYWO Server

iWYWO Upgrade - US $15.00/additional user   **$45.00**
For existing WYWO 4.4x, Classic or Professional Users
Purchase includes the new high performance WYWO Server

Purchase from: Intuit.com -
QuickBooks 5 user license upgrade with Ultimate Support Package   **$1359.16**

Appendix F: Suggested Methodology

Phase 1 – Purchasing *(2-3 weeks)*

1. **Hardware and software purchases**
   a. Software and hardware can be purchased on the Internet all at once and should be delivered in 2-3 weeks with standard shipping.

Phase 2 – Installation and Preparation *(1 week)*

1. **Network setup**
   a. The first step is to install and configure the local area network and connect it to the Internet.
   b. When configuring the VPN/Router, it should be password protected. PPTP VPN service should be configured.
2. **Computer installation**
   a. Client computers can now be safely connected to the network.
   b. Internet access should be verified.
   c. The server computer should be configured with a 'static' IP address. See Windows and VPN/Router documentation for instructions regarding this configuration.
   d. All Windows patches and service packs should be installed using Windows Update.
   e. Windows should be configured to automatically download new security patches and these should be installed regularly.
   f. Verify that antivirus virus definitions are updated and that automatic updates are configured. Computers should be configured to regularly scan the hard drive for viruses.
3. **Software installation**
   a. QuickBooks should now be installed per the instructions provided with the software on the server computer.
   b. The server computer should be configured to store the QuickBooks database.
   c. See QuickBooks support and documentation for more information.
   d. To use the online QuickBooks features, the firewall will need to be configured to allow the Intuit servers to connect to the server computer. Consult QuickBooks support and firewall documentation for more information.
   e. Install QuickBooks on remote and local client computers.
   f. Connect to VPN from remote computers and verify remote access.
4. **Back-up old data**
   a. An archive of ALL data should be created incase problems occur in migration.
   b. This should include all Excel spreadsheets, Outlook data, and QuickBooks data.

Phase 3 – Training *(1 – 2 months)*

1. **Application and procedural training**
   a. Users should learn and test the new system.
   b. Sample data should be used in this case to verify procedures.
   c. Procedures should be used and tested in conjunction with new software.
   d. Practice imports of old data into new system to verify data import methods.

Phase 4 – System Migration *(2 – 4 weeks)*

1. **Optional: Re-install QuickBooks**
   a. In some cases, it may be desired to reinstall the QuickBooks software and start fresh for the new system.
2. **Migrate data**
   a. This includes data imports from QuickBooks, Excel, and Outlook data.
   b. Care should be taken to research proper importing methods and data formats.
3. **Audit data**
   a. All 'old' data must be updated to conform to new formatting and procedural standards.
   b. This is important so that errors in the old data do not cause problems to persist into the new system.

Transition Complete