Chapter II

The Algos Center: Information Systems in a Small Non-Profit Organization

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EXECUTIVE SUMMARY

Two systems faculty from a university was contracted to perform an analysis of information systems at the Algos Center, a small non-profit charitable organization which provides support for children and their families facing losses. The Center specifically requested help in integrating its fundraising and accounting software packages or exploring alternative software solutions. It also needed to generate reports required by the Board of Directors and United Way. Finally, the Center requested help in designing a family database to capture and track statistics about the families receiving services. As the team analyzed the Center, they discovered many underlying issues that would form part of their recommendations to the staff. This case makes two contributions. First, it reveals many problems facing small non-profit organizations, which primarily expend their resources on mission-critical activities, and allows readers to supply possible courses of action. Second, it provides an opportunity to evaluate how a consulting experience was handled and to make recommendations to ensure successful project implementation.

ORGANIZATIONAL BACKGROUND

The Algos Center is a non-profit organization based on the East Coast. (Because we are using a pseudonym to describe the organization, the Web site address cannot be revealed.) It was founded in the 1990s by an individual who helped a young relative deal with her aunt's death; he saw a need for a Center that would help and support grieving children. The Center's mission is just that: to aid grieving children, teens, and their families through outreach, education, and peer support. The model for this organization is the Dougy Center, which was the first center in the United States to provide peer-based bereavement support groups for grieving children (Chappell, 2001; *http://www.dougy.org/about.html*).

In support of the mission, the Center sponsors many program activities, but bereavement peer support is the primary service provided (Rubin & Witztum, 2000; Stroebe, Strobebe, & Hansson, 2002). Approximately 170 children, teens, and adults attend these support groups every week. Trained volunteers conduct the groups. The volunteers seek to provide a safe environment for participants to express their feelings; they do not attempt to be counselors or therapists. A professional consultant or staff member also attends these meetings. All participants are welcome, even if they cannot afford the suggested monthly pledge donation. Groups are divided into age categories: three to five, six to eight, seven to 12, teens, and young adults (up to age 30). Adult family members participate in support groups as well.

A related program, the Life Care Program (LCP), offers support groups for children and teens dealing with family members facing terminal or life-threatening illnesses. This program was started in the mid-1990s in collaboration with several hospices, hospitals, and nursing and cancer associations. While the bereavement peer support program is ongoing, LCP is offered in six-week sessions.

Two other major programs are offered. The Diversity Peer Support Program provides peer support in association with Kennedy Elementary School, which has a very diverse student body. Many of the students come from war-torn backgrounds and have lost family members. The second program, Community Extensions, is aimed at helping schoolchildren who are faced with a loss, and at assisting adult organizations and businesses dealing with grief issues. Other Center services include presentations to organizations by trained volunteers, and sponsorship of an annual bereavement conference. In addition, the Center offers referrals to mental health professionals, gives telephone support, and sends brochures and other written materials to callers.

The Center is governed by a 25-member volunteer board of directors. The executive director, appointed by the board, manages three full-time staff, six part-time staff members, and five unpaid interns who are university students. More than 100 volunteers assist with the events and support groups. Because there are so few full- and part-time staff, the organizational structure is very flat and informal; most of the staff has direct access to the executive director (see Appendix A for the organization chart). The Center is a public, non-profit charity (a 501 (c) (3) organization) that relies on contributions from individuals, grants from foundations, and United Way allocations, as well as corporate sponsorships and special fundraising events, to support its operating budget. The Center sponsors many activities throughout the year including a Pet Walk, Fun Run, golf tournament, and a gala event featuring dinner and an auction. Appendix B shows its Statement of Income, Expenses and Changes in Net Assets for its most recent fiscal year.

Non-profit organizations such as this Center rely to a large extent on individual donations; successful fundraising necessitates tracking the funds that are received from each donor (Klein, 2004). Information is also needed to evaluate the effectiveness of each fundraising event. Non-profits often use specialized fundraising software for this purpose (Davis, 2002). In addition, the organization's accounting software must be set up so that donated funds or grants that are restricted in purpose can be carefully monitored to ensure that the funds are used only for their designated intentions (Gross, Larkin, & McCarthy, 2003). The Board of Directors typically wants expense information organized in the same way as the budget is prepared, generally by expense category such as salaries and rent, to ensure that the organization's expenses do not exceed the board's authorizations (Trussel, Greenlee, Brady, Colson, Goldband, & Morris, 2002). In addition, funding organizations such as United Way and government agencies, such as the IRS, require that expenses be reported by program type. Many non-profits thus have greater record-keeping requirements than do for-profit enterprises of comparable size (Cutt, Bragg, Balfour, Murray, & Tassey, 1996).

SETTING THE STAGE

Janet Tucker and Caryn Powell, two professors at a local university, both had a strong interest in non-profit organizations. Dr. Tucker was a professor of MIS with an emphasis in systems analysis, while Dr. Powell was an accounting professor with an emphasis in accounting information systems. They put out a general offer to conduct an information system needs assessment for any local non-profit organization in support of the university's mission of community involvement. The assessment could include problem or opportunity identification, project selection, a feasibility study, identification of project risks, and development of recommended courses of action (Block, 2000; Coates, 1997).

The Algos Center responded quickly to the solicitation, and, after a brief phone call with the executive director, a preliminary meeting was scheduled with the key organization members: Elizabeth Medford, Executive Director; Vicki Hume, Development Director; and Dawn Lopez, Operations Manager. Tucker and Powell put together an outline for their first meeting. They wanted to get a sense of what information systems issues the Center was facing, and to set the goals and boundaries for what they were offering to do. They wanted to clarify that they were not proposing to design and implement any new information systems, but rather to evaluate how information was being collected, stored, and reported, and to develop recommendations to improve the systems (Burt & Taylor, 2000). They wanted to set up a schedule to collect data and they also wanted to make sure that the board of directors would approve of their involvement (Cornforth, 2003).

At the initial meeting, Elizabeth Medford, Vicki Hume, and Dawn Lopez explained some of the major issues they had been having with their information systems. The first issue concerned the software they were using for fundraising, Paradigm (*http://www.mip.com/software/fundraising/paradigm.htm*), and their accounting software, QuickBooks (*http://quickbooks.intuit.com/*). Vicki said she was having a hard time getting the reports she needed out of Paradigm. Both Vicki and Elizabeth acknowledged that there were inconsistencies in how data (notably expense codes) were being entered in each program. Dawn believed that they were not taking full advantage of Paradigm's features. They liked QuickBooks, but they wanted to see if there were features in it that they could be using better, or if there was a way for the two packages to work together. This is a concern that many non-profits have when they attempt to use off-the-shelf software (Jones, 2000). Dawn noted that they were currently entering duplicate data in both systems.

The second issue concerned reports that the Center was obligated to produce for the board of directors and United Way. As is true of many non-profits, the Center received revenue not only from hundreds of individual and corporate donations, but also from various funding sources, such as United Way. These fund providers need detailed information about how the money is spent (Bradley, Jansen, & Silverman, 2003). Non-profits also require accurate financial and program data in order to plan for future growth — an especially critical need for organizations like the Center with limited technological expertise (Smith, 2002).

The third issue involved a database project that Dawn was starting. She wanted to design a family database that would allow the Center to track bereavement meetings and to generate statistics. The database would be useful to the Center, and it would also facilitate reporting to United Way. For example, United Way required demographic data that the Center staff had had trouble compiling other than manually (Cutt et al., 1996).

Elizabeth indicated that the Center was growing, and there was a need to prepare for the growth they were expecting. Tucker and Powell were offering their services pro bono, but they did ask Elizabeth if they should be mindful of any financial constraints when developing recommendations for purchasing software or equipment. Elizabeth said not to worry about it. Elizabeth also asked for confidentiality when viewing any information about their clients. However, she and the rest of the staff agreed to be very open about sharing documents and other agency information with the university team.

After their meeting, Tucker and Powell immediately drafted a letter to Elizabeth, which in essence was the consulting contract (Block, 2000). The agreement was to review their software, reports, and database design, and to evaluate alternative approaches to the integration and growth issues that had been discussed. The letter stated that the Center's current environment would be assessed through interviews, document collection and review, and an analysis of their computer systems. The project, starting in July, was to terminate in the fall with a formal report of recommendations.

CASE DESCRIPTION

Gathering Fundraising & Accounting Software Requirements

Tucker and Powell decided to meet first with Dawn Lopez, Operations Manager, to get an overview of how Paradigm (the fundraising software) and QuickBooks (the accounting software) were being used. Dawn was glad to show the team what she did. The team immediately got the impression that Dawn, as an information technology manager, worked hard to keep the Center's operations running, even though she worked part-time while pursuing a degree at a two-year technical school. Administrative

Assistant Alicia Austin recorded donations in Paradigm, and then, Dawn recorded the donated amounts in QuickBooks. Dawn stated that she believed Paradigm could be used to record information about the volunteers that the Center wanted but was not currently collecting. She also showed the team how she produced reports in QuickBooks.

Dawn provided the team with a document describing deposit and data entry procedures. The team noticed that the names used for the same donation types entered in Paradigm and in QuickBooks were not consistent. For example, QuickBooks used “publications” and Paradigm used “booklets” to describe the same thing. The team observed Dawn as she demonstrated how deposits were entered into QuickBooks. At month’s end, she manually compared the deposit report generated in QuickBooks with the list of donations entered in a Paradigm report. They usually did not match, and Dawn had to discover where the discrepancies were. In the case of one particular discrepancy, it was not easy for her to show the team how she had resolved it; she had simply attached a sticky note to a printed report saying that the discrepancy had been resolved. It seemed to the team that there was much less duplication of data in the fundraising and accounting programs than had originally appeared to be the case. The total dollar amount of a group of donations deposited at one time was entered as a single transaction in QuickBooks; the individual donations and data relating to each donor were recorded only in Paradigm. In another instance, the team observed Dawn entering a contribution that was designated to cover expenses as a negative expense, instead of as contribution revenue that would offset the relevant expense. Dawn admitted that although she was responsible for entering data into QuickBooks, she had no formal training in accounting. This is a common problem for non-profits with limited staff; they may not have been trained to enter data properly (Barrett & Greene, 2001). The team and Dawn also discovered that Paradigm only supported exporting data to a limited number of programs such as dBase, old versions of Excel, and a comma delimited ASCII format. There were no export options to QuickBooks. Dawn had not been successful trying to export data.

After meeting with Dawn, Tucker and Powell believed that meetings with both Vicki Hume and Elizabeth Medford were needed. They wanted to know how Vicki was using Paradigm, what reports she was producing, and what information she needed that she was not able to produce. From Elizabeth, they wanted to learn more about United Way reporting needs.

The team met with Vicki Hume and inquired about the donation category and expense code discrepancies between QuickBooks and Paradigm. Vicki replied that the staff had simply not gotten together to standardize the codes, and furthermore, that some codes were “deliberately” entered differently in the two software packages. She said she would prefer a solution where the Center could use QuickBooks for all their work, but she realized that fundraising software would be needed to handle event tracking, a feature usually absent from a general purpose software application.

As development director, Vicki was a heavy user of Paradigm. She generated two important reports: one segmented donors into categories to use in generating mailing lists; the other was an analysis of contributions, which she used to track the progress of fundraising campaigns and to analyze donation trends (see Appendix C for a sample report). In order to produce reports, it was necessary to generate queries; some reports also required subqueries. For many reports, Vicki kept getting an error message that the subquery could not return more than one row. The team asked Vicki to keep track of specific querying problems over the next few weeks. Vicki agreed with Dawn that there were many functions in Paradigm that were not being used, and that it was hard to figure out which fields would print out. She also had to resort to calculating many aggregate functions (e.g., counts, averages) manually. When the team asked if she consulted the user's manual to help solve some of these problems, she remarked that the user's manual was missing. Concerning vendor support, Vicki said she believed they paid a flat rate for a specific number of calls per year, and to ask Dawn for details.

During a subsequent meeting with Dawn, Vicki presented the team with a Paradigm query she had tried to run without success. Vicki also said that she wanted an audit trail of who made each update to the data in Paradigm to see who might be to "blame" for poor data entry. Later, back at the university, the team re-ran the query using test data on their office computer and found that it worked perfectly. During their next visit, they examined some of Paradigm's features with Dawn and found an error log tool. The error log displayed error codes and SQL statements that appeared to fail because of data entry problems (e.g., attempts to put two values into a single-valued field). Dawn learned that she could contact the vendor to acquire SQL scripts that could be run to "kick out" problem data. Dawn had never previously looked at the error log.

Tucker and Powell asked Dawn for more information about Paradigm documentation and user training. First, the team inquired about the missing Paradigm manual; Dawn said it was available, and that Vicki would often say that something was missing when, in fact, it was not. Dawn loaned the manual to the team and the CD-ROM updates. The CD had updated pages that were supposed to be printed out and inserted into the manual, but although the pages had been printed out, Dawn lacked the time to insert the pages. It was later discovered that the CD actually had the complete manual on it, but that several computers (including Vicki's) lacked CD-ROM drives. The team then asked about the Paradigm training Dawn had received. Training is often a major component in successful technology adoption, but can often be a shortchanged component in a resource-constrained non-profit organization (Barrett & Greene, 2001; Hecht & Ramsey, 2002; Light, 2002). Staff personnel need to be cross-trained in the event that one staff member should leave. The staff also needs ongoing training to take advantage of upgrades in software, hardware, networking, etc. (Smith, Bucklin & Associates, Inc., 2000). Both Dawn and Alicia had taken a training course. The training emphasized building queries that served as the basis for generating reports. Dawn told the team that she could call the vendor for unlimited support and that all of the updates came bundled with the support contract.

Center Reporting Requirements

Elizabeth discussed reports requested by the board of directors with the team. To produce one of the reports required by the board, the treasurer had to export information from two QuickBooks reports into an Excel spreadsheet; from there, he had to manually prepare the report in the desired format. Elizabeth hoped it would be possible to produce this report more easily, saving the treasurer much effort. Elizabeth also explained that the board needed to have monthly reports that listed expenses by functional classification (e.g., for salaries, rent, depreciation, and utilities) in the same format in which the budget was prepared (see Appendix D for a sample report). This format would improve the directors' ability to compare expenses with budget authorizations. United Way required not only expenses by functional classification, but also wanted management expenses to be distinguished from program expenses (see Appendix E for a sample United Way report). The Center wanted to set up the accounts in QuickBooks so that the data could be retrieved more easily by both functional classification and program. In addition, Elizabeth explained that increasing reliance on grants meant that in the near future, the Center would need to start tracking the use of restricted purpose funds across fiscal years. There was no one on the staff who knew how to do this in QuickBooks.

The Family Database Project

Elizabeth explained that the Center needed a database because United Way required a lot of demographic information about the Center's clients, such as age, ethnicity, etc. She provided the team with the Center's intake form that clients fill out and a copy of the United Way's information requirements. Elizabeth said there were two important reports that would be "nice to have." First, she wanted a report that provided the reasons why families sought out the Center; this report would enable the staff to analyze who did or did not use the Center and why. The second was a report that would show the growth in demand for services over the years. Dawn provided the team with a description of the types of information they wanted from the database. Some of the desired information would require data the Center did not currently collect. She also provided a copy of her plan to set up the database in Microsoft Access (*http://www.microsoft.com*) including a list of tables and attributes (see Appendix F for her data model).

Tucker and Powell analyzed the forms and compared them to both Elizabeth's reporting requests and to the requirements Dawn had provided for future report generation. The Center's intake form lacked some of the fields (e.g., ethnicity) for information that Elizabeth needed for United Way reporting. In addition, some of the information, such as income that United Way requested was included on the intake form, but was not being filled in.

The team spent additional time seeking clarification from Dawn about the data the Center wanted to track, as well as assessing her database design skills and her preliminary data model. Dawn said she had taken an online course in Microsoft Access and had gotten an A in it; however, the concept of foreign keys was new to her. As the team worked with Dawn on redesigning the data model, they discovered that the Center also wanted to use the family database to track attendance at various group sessions; however, facilitators were not taking attendance at group meetings. The Center also wanted to track phone calls using the family database; thus, Dawn had included phone calls in her original data model. The Center wanted every cold call as well as calls from participating (current) clients to be included in the database. There was no policy about how long the Center planned to keep the data. Pamela Russell, Family Coordinator, kept a manual phone log, so the team decided that talking with her would be in order (see Tribunella, Warner, & Smith, 2002, for a rigorous discussion of database design).

The team then paid a visit to Pamela to look at the phone log. They discovered that Pamela kept a manual log of all calls, but that she was instructed to check off only one action (outcome) per call (see Appendix G for the phone log form). For example, if she mailed program information to a caller and provided an outside referral, she could only select one of those outcomes. At the end of every month, she manually tallied up the different actions and then summed those totals for the reporting year (Tribunella et al., 2002, discuss more systematic data gathering approaches).

CURRENT CHALLENGES/PROBLEMS FACING THE ORGANIZATION

Given the number of technology issues they found, Tucker and Powell were impressed with the way the Center's staff managed to keep their operations running as smoothly as they did. They were further impressed when they saw the hardware the Center was using. The file server was a donated PC that was rapidly running out of disk space. During the team's visits, Dawn was able to acquire another PC that she hooked up to the first one as a cluster. Most of the computer equipment in the Center had been donated; in fact, one of the team members wound up donating her five-year-old computer, and it was gratefully accepted. They were particularly impressed with the staff, especially Dawn. Not only was Dawn going to school and working at the Center part-time, she was also heavily involved (as were the rest of the staff) in fundraising activities. She even served as a bereavement support facilitator.

As Tucker and Powell studied the Center, they kept thinking about what they would put into their final report of recommendations, and what kinds of reactions they would receive. The Center, as an organization with a small staff and limited resources, was acting as an "adopter" of technology; that is, the type of organization that is simply operating in a survival mode and "making do" with existing technology (Fried, 1995). A major challenge facing many consultants working with non-profits is that they encounter a culture where non-profits shortchange themselves on technological resources, so that they can devote most of their resources to the primary mission (McCarthy, 2003). Tucker and Powell also knew that some of the Center's staff was aware that technology might be better harnessed to support their mission activities, but the staff did not have a plan in place for realizing this goal. Some of those technology goals would mean that the Center would experience radical changes in its business processes (Amis, Slack, & Hinings, 2004). Was the Center ready for change? The team also reflected on how they might evaluate their own efforts as consultants and as change agents (Bergholz, 1999). They had tried to function in the role of facilitator, which involved empowering clients to "own" changes in technology use and to mobilize and support client initiatives (Winston, 1999); however, they wondered if instead their role had been more of a traditional one or as an advocator. In the traditional role, consultants functioning as change agents focus on the implementation of technology, while advocators create a business vision and pro-actively function as champions for change (Winston, 1999). Was their position as facilitator a good match for a client in the adoptive mode? Had they been effective consultants to the Algos Center to date? How could they be useful to the Center in the future?

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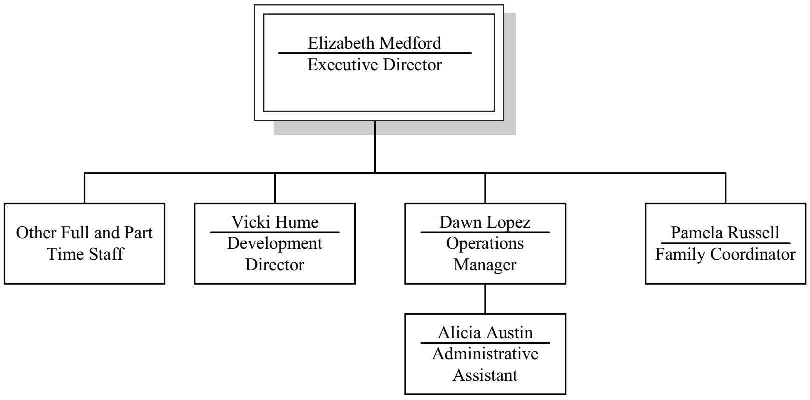
APPENDIX A

Organization Chart for the Algos Center



Note: Any of these staff positions may supervise volunteers on an informal basis.

APPENDIX B

Financial Statement for the Year July 1, 2001 through June 30, 2002

Income:	
Contributions	$152,009
Special Events (less net expenses)	$99,173
United Way/Designated Donations/Allocation	$99,312
Foundations and Grants	$108,929
Investments	($27,214)
Other Donations	$32,770
Donated Services	$10,645
Net Assets released from the restricted fund (scholarship fund payment)	$1,073
Total Support Revenue:	$476,697

Expenses:	
Program Expenses	$342,153
Management and General	$91,083
Fundraising	$32,546
Total Expenses:	$465,782
Increase in unrestricted net assets:	$10,915
Decrease in restricted net assets:	($3,893)
Net assets, beginning of year:	$368,155
Net assets, end of year:	$375,477

APPENDIX C

Sample Paradigm Report

Donors who gave amounts (gifts or pledge payments) greater than or equal to $50, between 7/1/00 and 6/30/02 (for the 2001/2002 Annual Appeal, AA01, or Core Support 01 Campaigns

Name	***Donor Address***	***City***	***State***	***Zip***	***Gift Amount***	***Date***	***Gift/ Pledge Payment***	***Campaign***
John Johnson	678 Long Lane	Smithfield	MD	xxxxx	$200	3/13/2002	Pledge Payment	Ann. Appeal 01/02
Susie Smith	1040 Taylor Road	Chelmstown	MA	xxxxx	$75	4/20/01	Gift	AA01
Mr. & Mrs. Thompson	123 Main Street	Union	NY	xxxxx	$150	11/20/00	Gift	Ann. Appeal 01/02
Mr. & Mrs. Thompson	124 Main Street	Union	NY	xxxxx	$50	5/4/01	Pledge Payment	Core Support 01

APPENDIX D

Sample Expense Report

	Jul-03	Aug-03	Sep-03
Expense			
60000 - Personnel			
60100 - Salaries and Wages	19,356	20,211	9,863
60105 - FICA	1,045	1 ,091	1,073
60115 - SUTA	46	54	49
60125 - Health Insurance	1,143	1,158	1,150
60130 - Simple IRA Contribution	385	412	400
60140 - Other Insurances	980		
Total 600000 - Personnel	22,955	22,926	22,535

APPENDIX D (cont.)

60200 - Building			
60205 - Cleaning	250	250	250
60210 - Insurance	500	500	500
60215 - Real Estate Taxes			2,500
60220 - Rent	495	495	495
60225 - Utilities	618	798	329
60290 - Other Building	100	48	31
Total 60200 - Building	1,963	2,091	4,105
60300 - Office & Administration			
60305 - Accounting & Payroll	325	325	325
60310 - Audit			2,900
60312 - Credit Card/Bank Fees	75	64	89
60315 - Equipment Maintenance	300	300	300
60320 - Office Supplies	283	196	421
60325 - Postage	334	308	471
60335 - Technical/Sftwr Support	275	275	275
60340 - Telephone	256	289	271
60390 - Other Office & Admin	68	123	83
Total 60300 - Office & Administration	1,916	1,880	5,135
	$26,834	$26,897	$31,775

APPENDIX E

United Way Report

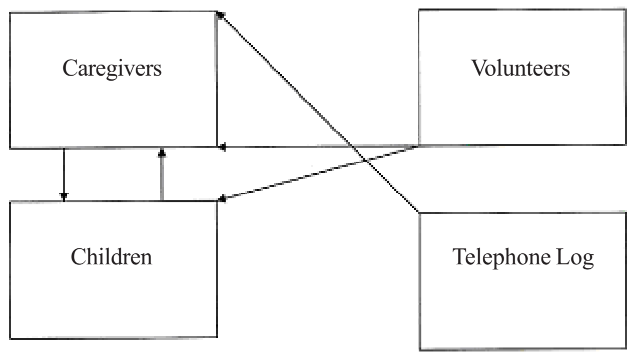
FISCAL YEAR _______	GRAND TOTAL	MANAGEMENT	PROGRAM SERVICES			
EXPENSES FOR CURRENT YEAR ALLOCATION	1.	2.	3.	4.	5.	6.
22. Salaries						
23. Employee benefits						
24. Payroll Taxes, etc.						
25. Professional Fees						
26. Supplies						
27. Telephone						
28. Postage and Shipping						
29. Occupancy						
30. Rental/Maintenance of Equipment						
31. Printing and Publications						
32. Travel Conferences						
33. Miscellaneous (Include Insurance here)						
34. Payments to Affiliated Organizations						
35. Depreciation*						
36. Major Equipment/Mortgage*						
37. SUBTOTAL EXPENSES	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
38. Less Expenses for activities financed by:						
Restricted Revenue……………………						
Depreciation Expenses*………………						
Major Equipment/Mortgage*………….						
39. **TOTAL EXPENSES FOR ACTIVITIES FINANCED BY**	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
40. **DEFICIT/SURPLUS** (Line 21, page 6 minus Line 39)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

*United Way does not fund these costs. However, for financial reporting purposes, please include them on this line, then remove them in Line 38.

APPENDIX F

Dawn's Data Model

Tables and Relationships



Field Breakdown:

Caregiver Table

Family Id
Primary Affiliation - combo box
Adult 1 Last Name
Adult 1 First Name
Adult 1 Telephone
Adult 1 Employer & Title
Adult 1 Gender
Adult 1 Nationality
Adult 1 Date of Birth
Adult 2 Last Name
Adult 2 First Name
Adult 2 Telephone
Adult 2 Employer & Title
Adult 2 Gender
Adult 2 Nationality
Adult 2 Date of Birth
Address
City
State
Zip Code
Email Address
Intaker 1 - links to Volunteer Id
Intaker 2 - links to Volunteer Id
Intake Date
Appropriate for Groups - Yes/No
If Yes, which group - combo box
If No, reason why - combo box
Referral Source
Currently Attending - Yes/No
Start Date 1
End Date 1
Start Date 2
End Date 2
Current Night of Service
Current Co-Facilitator 1 - links to Volunteer Id
Current Co-Facilitator 2 - links to Volunteer Id
Previous Night of Service
Previous Co-Facilitator 1 - links to Volunteer Id
Previous Co-Facilitator 2 - links to Volunteer Id
Name of Deceased
Relationship to Deceased
Cause of Death
Date of Death
Date of FirstCall - could link to telephone log
Wait List - Yes/No
Policies given - Yes/No
Mailings to receive - combo box
Relation to children attending - combo box

APPENDIX F (cont.)

Field Breakdown continued:

Children Table

Family Id - links to caregivers
Primary Affiliation - combo box
Last Name
First Name
Intaker 1 - links to Volunteer Id
Intaker 2 - links to Volunteer Id
Intake Date
Appropriate for Groups - Yes/No
If Yes, which group - combo box
If No, reason why - combo box
Currently attending - Yes/No
State Date 1
End Date 1
Start Date 2
End Date 2
Current Night of Service
Current Co-Facilitator 1 - links to Volunteer Id
Current Co-Facilitator 2 - links to Volunteer Id
Previous Night of Service
Previous Co-Facilitator 1 - links to Volunteer Id
Previous Co-Facilitator 2 - links to Volunteer Id
Name of Deceased
Relationship to Deceased
Cause of Death
Date of Death

Volunteer Table

Volunteer Id - links to group members
Primary Affiliations - combo box
Volunteer Preference
Other Interests - combo box
Training Date
Current Night of Service - combo box
Current Co-Facilitator - links to Volunteer Id
Current Age Group
State Date 1
End Date 1
Previous Night of Service/Volunteering 1
Previous Co-Facilitator 1 - links to Volunteer Id
Start Date 2
End Date 2
Previous Night of Service/Volunteering 2
Current Co-Facilitator 2 - links to Volunteer Id
Start Date 3
End Date 3
Date of Birth
Gender
Nationality
Employer & Title
Referral Source
In-Services Attended - text area

Telephone Log Table

Last Name
First Name
Relation to Grieving Chile
Business/Organization Name
Address
City
State
Zip Code
Telephone 1
Telephone 2
Email Address
Type of Caller
Type of Service Provider
Referral Source

APPENDIX G

Center Phone Log

PHONE LOG

Date_____________________

Time_____________________

	Verbal Program Info.	Info. Sent	Phone Support	Referral to our program	Referral to other center	Referral to other resource	Total
Family							
Agency/ School							
Individual							
Volunteer							
Other Center							
Student							
Other							