



LESLIE SCIENCE & NATURE CENTER

SI 501 CONTEXTUAL INQUIRY REPORT

kevin kinney • lili marchak • anthony saint jean
colby chambers • niro haryamen mohd rais

PREPARED FOR:
SUSAN WESTHOFF
SUSAN@LESLIESNC.ORG

TEAM CONTACT:
SI501PROJECTTEAM@UMICH.EDU

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EXECUTIVE SUMMARY

Leslie Science and Nature Center has asked our team to evaluate the flow of information in their customer management processes in an effort to improve customer service quality for their patrons. The purpose of this report is to describe the findings and recommendations we have discovered in our analysis. Our team conducted interviews with five staff members to investigate Leslie's information workflow. Our evaluation found that Leslie lacks the human and business capital necessary to achieve the high quality they strive for in their work. We recommend that Leslie place a high priority on hiring a Communications Director as soon as possible in order to free up resources throughout the organization.

We also found that Leslie lacks the technical expertise required to effectively use CIVI, a database that is the cornerstone to a number of customer management processes, including sending emails and calendar invitations. We recommend that Leslie formulate a long-term IT plan that involves finding support for CIVI or consider moving to a new database altogether. Lastly, we found that Leslie has internal communication issues that reduce operational efficiency and external communication issues that can be amended to improve customer relations. We recommend using one electronic calendar system to standardize internal communication. We also recommend that Leslie consider utilizing resources from two nearby universities (University of Michigan and Eastern Michigan University) in order to market their programs to a wider customer base and engage young professionals as communication interns at their organization. Our recommendations seek to improve Leslie's internal business processes so that they can continue to provide high quality programs to the Washtenaw County community.

BACKGROUND

Leslie Science and Nature Center is an environmental education nonprofit located in Ann Arbor, MI. Its mission is to connect Southeast Michigan with the natural world and it seeks to accomplish this through educational events for individuals of all ages. Recently, one of the directors expressed concern over the organization's lack of consistent communication with its customer base, specifically after events have been held. The purpose of our study and this report is to identify possible lapses in communication and to make recommendations for remedying them.

OVERVIEW OF METHODS

Our methods included extensive interviews with five staff members - three directors and two managers - in their respective workspaces, making observations of how each staff member interacts with company materials and other staff members. After the interviews and observations were completed, we documented the information flow using a series of models which represented various routines and attitudes present within Leslie. We further documented our findings on an Affinity Wall, a wall of notes containing further information derived from our interviews with the staff about the company's workflow processes. The Wall helped us organize our data in a streamlined manner and it aided us in identifying local and global challenges to Leslie's communication with its customers.

COMMUNICATION & RELATIONSHIP BUILDING

INTERNAL COMMUNICATION

Internal communication, which is defined as “the function accountable for effective communication among participants within an organization”, is essential to any organization (Smith, 2008). Internal communication can take many forms including face-to-face, phone (call or text), electronic (email, intranet, etc.), and print (newsletters, memos, etc.). Strong communication within an institution informs and engages your workforce to produce better results. Poor internal communication can demotivate collaboration, productivity, and performance.

Finding 1: Staff meetings at Leslie are inefficient

A common complaint among Leslie employees is that staff meetings are unproductive. During an interview with a manager, we found that administration meetings can last up to two hours per week for operational staff. This appears to be too long for at least one employee. Efforts are currently being placed on streamlining these meetings to take less time and be more productive. The employees also find that smaller and non-administration meetings are not effective. One staff member sits in on numerous meetings throughout the week but feels that

these meetings are not an effective way to spend her time as they rarely pertain to her work processes. This employee is already extremely busy, so the meetings are especially counterproductive for her.

Finding 2: Leslie has standard meeting times but scheduling is difficult

Leslie has a number of standing meetings scheduled either weekly or bi-weekly. For example, there is a weekly meeting with all full-time staff that usually takes place Thursdays at 9am. There are also standing meetings for topics such as finance, staffing, and other operational matters. Unfortunately, it is sometimes challenging to execute the scheduled meeting for two reasons. One reason we learned during an interview was that poor communication has made coordinating meetings difficult. A lack of a standard calendar means that there are multiple calendars being used by staff, creating a disconnect in the process of planning meetings. The other reason executing scheduled meetings is difficult is because some employees work outside the standard operating hours (9am-5pm).

Finding 3: Leslie employees prefer meeting face-to-face but this is not always possible

Leslie has a number of programs that take place outside standard operating hours. As a result, program managers often work on a schedule that differs from other Leslie employees. Because of this, employees cannot always conduct their meetings face-to-face, as most of them would prefer. For example, if a program manager has to work her scheduled program from 5pm-10pm, it is unlikely that she will work during standard operating hours the following day. This means that she will not be able to attend certain meetings. Program managers communicate with other employees through email or phone when such a situation occurs. This can be a hindrance as face-to-face meetings are preferred.

MAINTAINING CUSTOMER RELATIONSHIPS

External communication is defined as “communication that focuses on stakeholders and customers outside the organization (Saunders, 1999). This form of communication is vital in establishing a brand that draws in customers and other stakeholders. Examples of external communication methods include newsletters, emails, job listings, advertisements, and annual reports. These tactics serve to promote the company and improve the bottom line by driving revenue and other resources such as potential investors.

Finding 4: Leslie lacks a cohesive strategy to advertise our programs

Leslie primarily markets through social media outlets such as Twitter, Facebook, Pinterest, and Flickr. Their social media outlets are managed primarily by one of the directors, who reported during an interview that she has taken this responsibility on after the departure of their Communications Director in January, which further adds to her workload. Also, an e-newsletter with advertisements is sent out bi-weekly to past program participants. They do not use flyers or snail mail to advertise their programs because, as an environmental nonprofit, they do not want to waste paper. Leslie also does not advertise on any college campuses.

Finding 5: Leslie wants to diversity its audience.

Leslie recognized through their programs that their primary customers are young children and elderly individuals. They would like to open their customer base to include a wider range of ages, with a particular focus on college-aged individuals in Washtenaw County. One of the directors reported in an interview that one strategy that they have considered is utilizing videos rather than brochures to target young adults because they would view a video about Leslie before they would read any literature about the organization.

RECOMMENDATIONS

SHORT-TERM

- 1 Create a plan that clearly defines how weekly and bi-weekly meetings are run and what objective(s) should be met during the meetings. It would effectively free up time to only include individuals who are needed for a successful meeting. This solution may be difficult to implement if employees disagree on the manner in which meetings should operate. Compromise may be necessary in order to encompass the needs of each employee.
- 2 Establish a mandatory electronic calendar system for the entire organization. Streamlining calendar events ensures everyone is on the same page. This solution may be difficult to implement because it seems that some employees prefer to use paper calendars. Proper training and guidance can be provided to appease the concerns of these individuals.

LONG-TERM

- 3 Take advantage of local student talent by offering a Communications Internship that focuses on building Leslie's brand through social media and other venues. University of Michigan (UM) and Eastern Michigan University (EMU) are local schools that can provide many interested students. Contact the career center at each of these schools in order to begin the process of creating an internship program that would begin at the start of each school's academic year.
- 4 Create a marketing strategy that utilizes local universities as advertisement hubs. Your next target audience (under 30 years old) interacts with UM and EMU resources regularly, so these universities could help spread external communication that promotes Leslie.

HUMAN & BUSINESS CAPITAL

WORKFLOW

Any sequence of internal processes or activities utilized to complete tasks for an organization is considered a workflow. While these processes range in efficiency from person to person, it is important to understand that individual workflow impacts the entire workflow of an organization. Leslie currently has difficulty maintaining a workflow that is resource-efficient, which can negatively influence productivity, budgets, and communication.

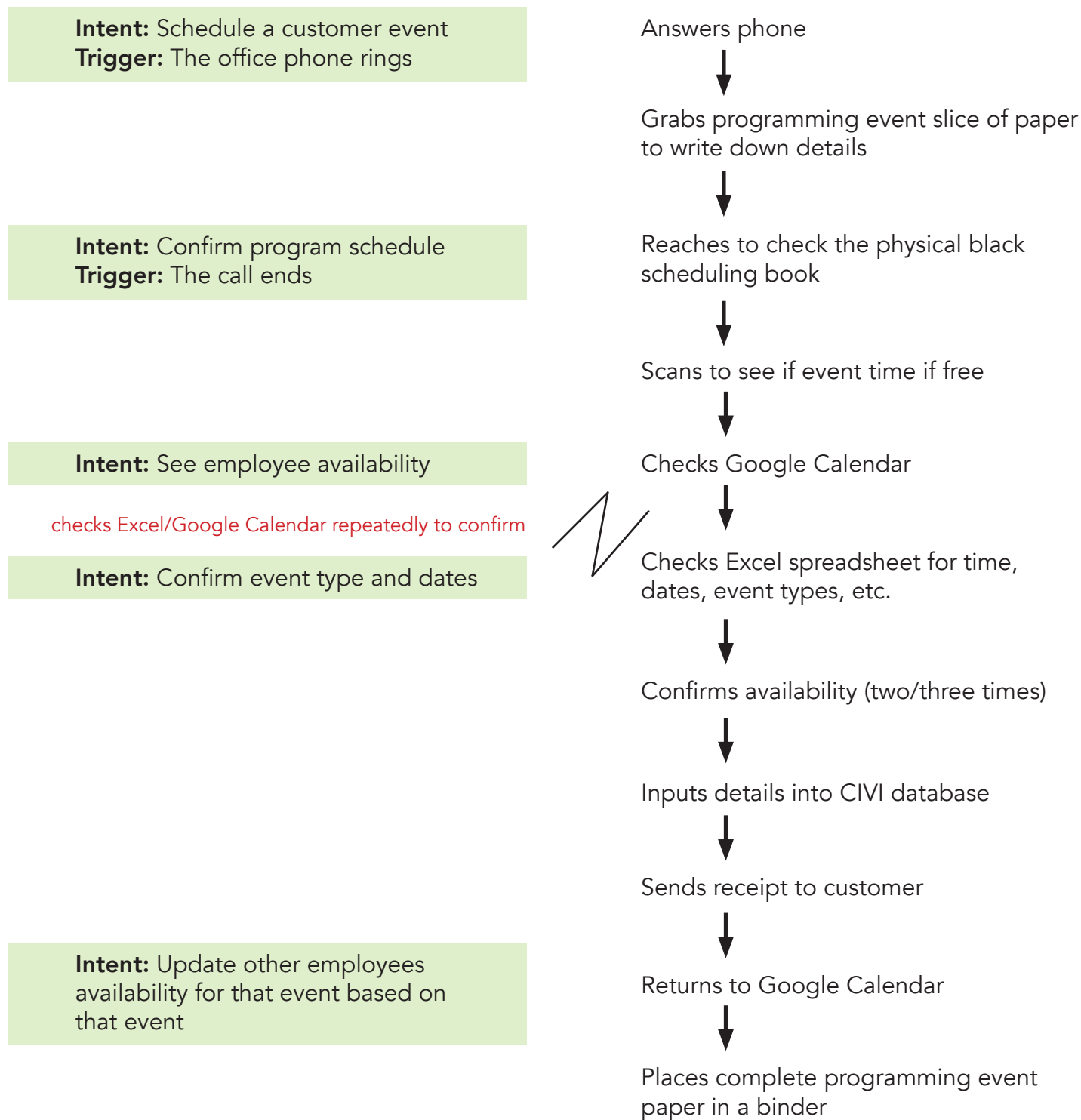
Finding 6: Simple tasks have too many steps

Every employee has individualized methods to complete tasks related to their position in Leslie. These methods are often overly complicated, redundant, and inefficient. This is due in part to technological affordances and also to individual routine. The following chart outlines the workflow of a Leslie employee in reference to scheduling a program. Highlighted in the following page are several redundancies in their position and displays this employee's workflow:

Leslie Science and Nature Center

Figure 1: Sequence Model

Sequence #1



There are several schedules in existence, which include online calendars such as Google Calendar and CIVI, while physical schedules also exist in a black book located in the main office. Each employee has a different preference in his or her communication style, so any employee setting up a program has to make sure each schedule space has to be updated so that every staff member is fully informed. Entering a program event should be a simple task with very few steps, but Leslie's current system requires time and energy to keep all programs updated successfully.

Finding 7: Leslie tries to do too much with too few resources

In recent years, Leslie has grown as an organization. The routines that worked well for maintaining a small number of employees have now become outdated as Leslie has to manage more people and more programs. Because this management has not adapted to support the increase in workload or staff numbers, time and energy are spread thin amongst employees. Often, tasks are completed quickly in order to move onto the next item on their checklist, which impacts workflow quality. It appears that several programs are attempting to focus on quality over quantity, but that can be difficult when tasks are rushed to completion.

Leslie lacks resources, the most pressing being time and money. Since these resources are precious, they should be utilized efficiently—which is easier said than done. For example, Leslie has difficulty determining which programs will be the most successful with customers. Recently, very few people attended a program about beer. This was the second attempt at this program, and both sessions turned very little profit. The expense of time, energy, and money to provide an event with very little turnout is a poor utilization of Leslie resources.

Finding 8: Leslie's infrastructure does not meet employee needs

Retaining Leslie's house structure and grounds supports the nature center's educational goals and their laid-back atmosphere, but it also negatively impacts communication between employees. Since staff members are scattered in different buildings throughout the grounds, it is difficult to maintain consistent communication. This becomes problematic when workflow processes require the input or work of another employee. A task that could be accomplished easily if employees worked in the same area becomes tedious when staff members are located in different buildings across Leslie.

Also, space is lacking for customers to be received for events, programs, and camp sessions. Upon entering the main office, there is very little room for visitors to stand or sit. It is cluttered, small, and not entirely welcoming to visitors. The main office is available to customers during open hours, but it is inaccessible during the weekends. In the past, this had become an issue when customers required a warm place to wait before an event began in cold weather conditions. This caused several problems for different employees, including one of the directors. If the grounds could afford a space designated for customers that Leslie could maintain, employees would not be burdened with such an issue.

ORGANIZATIONAL PRODUCTIVITY

Finding 9: Leslie is unable to retain employees

With Leslie's limited resources, it is difficult to retain and incentivize staff to return year after year. Because of this, new temporary employees are brought into Leslie each season and require months of training. The time, energy, and money spent on training these new hires are lost when there is very little return the next year; when each of these employees does not stay on staff, it represents a lost investment. This pervasive organizational idea of "quantity over quality" reflects in their staff; instead, employees should exercise "quality over quantity" in order to best utilize Leslie resources. With less returning staff, educators should be able to spend less time, energy, and

money on training and focus more on improving the programs at Leslie.

Finding 10: *An absence at Leslie stresses their productivity*

Since the Communications Director's departure in January, a large void has appeared in Leslie's internal organization and workflow. Employees in positions unrelated to communications have taken on additional duties that they may or may not be suited to in order to make up for this absence (one of the directors handling Leslie's social media platforms in the interim, for example). Taking on communications work in addition to their regular workload compromises their ability to complete either set of tasks successfully. Additionally, it obscures big picture goals; each employee focuses on the day-to-day routine of managing all of their respective duties rather than focusing on the overall betterment of Leslie. During an interview, one employee remarked, "It's good that we're talking about this. We get caught up in the day-to-day and we were going to do all these things that were going to make our lives easier!"

"It's good that we're talking about this. We get caught up in the day-to-day and we were going to do all these things that were going to make our lives easier!"

- Leslie Employee

RECOMMENDATIONS

SHORT-TERM

- 1 Hire a new Communications Director immediately. Each individual interviewed mentioned the gap that was created in work culture and workflow when the most recent Communications Director left to pursue other work. Since other employees are attempting to ease the stress of her absence by taking on her work, they are unable to fully commit to their respective positions. Once a new Communications Director is hired and assumes the responsibilities that are currently given to other employees, stress with other positions at Leslie will lessen. This will then boost the quality of their work once that additional stress is managed.
- 2 Once the Communications Director position is filled, those who participate in the grant cycle should focus their energy on applying for more funds. Leslie needs more funding in order to accomplish some of the proposed long-term recommendations. To better boost Leslie's productivity, someone should be at all times working with grant cycles and put efforts in raising money from members/donors.
- 3 Leslie needs to research their future programs and get in touch with customer needs before planning/funding an event. This can be done with surveys, interviews with customers, or online data collection reflecting customer interest. Gathering this data will help Leslie better utilize their limited resources.

LONG-TERM

- 4 Aim to place related staff in the same building rather than spread employees across Leslie grounds in order to make communication more efficient. This will take more resources than Leslie currently has at the moment, and may be projected at completion in 3 to 5 years. However, this will allow the opportunity for more face-to-face meetings (as Leslie prefers) and encourage a

smoother workflow. Employees mentioned that this idea has been thrown around once or twice; it is highly suggested that this is pursued in order to boost employee communication.

- 5 Create an inviting space specific to greeting and managing customers. The current main office is small and does not utilize space to its fullest potential. Like the previous recommendation, creating this space and building it may take 3-5 years to accomplish. However, this will help Leslie create a welcoming environment for customers and will aid overall office management.
- 6 Incentivize staff intrinsically to motivate them to stay at Leslie. Asking for participation in creating programs and giving them an opportunity to impact the organization will make employees feel valued. Instilling this sense in employees is essential as Leslie currently does not have enough resources to motivate them extrinsically with either pay or benefits. When there are more resources available at Leslie, external incentives will help maintain staff over long periods of time when combined with internal incentives.

INSTITUTIONAL KNOWLEDGE

DEFINITION

For any organization, institutional knowledge is necessary to properly recruit and retain employees. The inability to transfer institutional knowledge often results in a steady increase in staff turnover, as employees are not provided with the resources or direction to effectively perform their job. This cycle of recruiting, hiring, training, and losing employees translates into higher costs and poor organizational efficiency.

Finding 11: Knowledge sharing is limited

In one interview, a director reported that staff turnover is a recurring problem and Leslie lacks the ability to transfer the level and capacity of institutional knowledge that leaves with these employees. Specifically, institutional knowledge is not housed in tangible, readily available resources. During the interviews, we discovered it was not uncommon for only one person to know the answer to a problem, question, or how to conduct a process. Furthermore, due to conflicting schedules and varied communication strategies, it was not uncommon for this person to be unavailable, or unable to be reached in a timely fashion. This problem is likely due to employee roles being highly individualized and the apparent lack of employee resources and training.

During the interviews, we asked the employees who fills in for them if they are on vacation, sick, or have an emergency. The common answer was no one, especially during short absences. Even for long or planned absences, it did not seem uncommon for employees to have their job tasks accumulate until they returned. Sometimes other employees did fill in for employees during planned absences; however, the employee to be absent would need to create a quite how-to guide for the substitute. This is because job descriptions, training manuals, or documented standard procedures are not comprehensive or do not exist at all. This lack of support and backup for employees can be dangerous and can contribute to employee burnout, staff turnover, apathy, and errors.

Furthermore, staff positions are not always filled when an employee leaves. In other words, new staff that fill the vacant role are not trained by the employee they are replacing. Without a reference guide, the new employee creates new processes to fulfill the role of the job. This can be disastrous for business continuity, and can increase inefficiency as other employees must learn how to integrate new processes into their workflow.

Finding 12: Leslie lacks standard processes

Leslie lacks reference documents for individual, organizational, and employee processes. Without a framework to guide how Leslie processes are conducted, individuals are left to decide how to conduct organizational practices - which appear to be decided on a case-by-case, or day-by-day basis. Interviewed employees recognized the organization lacked standard practices across employee and departmental roles. Key areas for improvement identified were program scheduling and staffing, employee and volunteer training, external communication with customers, and internal communication of “need to know” information. There was also a clear desire expressed by interviewees for more automated processes that would cut down on repetitious and cumbersome responsibilities.

The lack of standard business practices is detrimental to team-building among staff. This is because employees are able to choose the quickest, easiest way to accomplish a task for themselves alone. Furthermore, when employees choose what is easiest or quickest for themselves - even if it means choosing not to do something at all - other affected staff feel that they must accommodate these individual preferences regardless of whether or not it means more work. For example, the program schedule must be maintained in multiple formats, as employees have preferences on where and how they want to access Leslie’s program and staff schedules. Additionally, when educators choose not to enter program attendance into CIVI as they are required, it becomes someone else’s responsibility to complete it. Therefore, instead of deciding as a team how problems can be solved, or tasks can be streamlined, more and more processes are added to the daily workflow. The model featured below depicts the typical workflow across the organization; due to individual variability and limited standard practices there are several points in the model where breakdowns occur (shown in red).

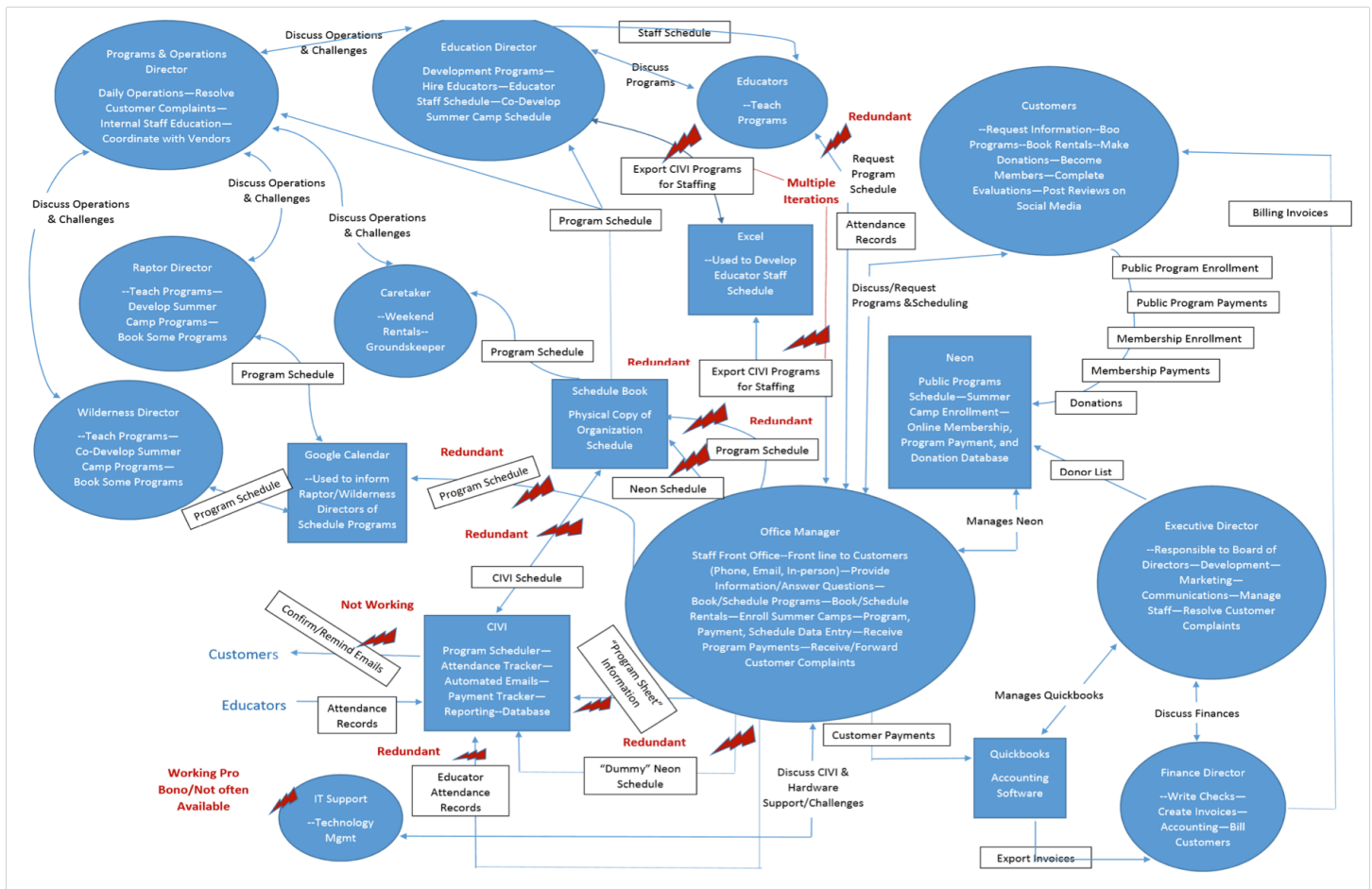


Figure 2: Flow Model Diagram

RECOMMENDATIONS

SHORT-TERM

- 1 Identify a few key things that every employee should know or be able to do; turn this from an implicit assumption to an explicit expectation, i.e. build this core knowledge into the onboarding process, have refresher sessions at leadership/staff meetings, chart organizational progress. The identification can be done by soliciting feedback during staff meetings and coming to a collective agreement on what knowledge and tasks are most important to be proficient in.
- 2 Have more experienced workers serve as mentors and trainers, especially for new hires. This would allow the experienced workers to pass on their institutional knowledge to others within the organization. One way this can be implemented is to have an employee accompany a senior employee during the latter's workday, gaining some familiarity with the senior employee's daily responsibilities.
- 3 Decide as a team where all shared documents will be maintained and accessed; get rid of duplicate/redundant documents; determine how, when, and by whom documents will be maintained and accessed. This can also be agreed on during regular staff meetings; the regularity may depend on the number and importance of said documents.

LONG-TERM

- 4 Develop systems and processes as a team; mandate compromise; do not allow "workarounds" or processes that only work for one individual; change/update processes as a team as needed.
- 5 Build an explicit strategy for maintaining institutional memory; i.e. develop specialized training practices for all positions, document standard processes, cross-train employees, increase job sharing.
- 6 Use technology to create a process by which your team continually captures and curates institutional knowledge; make it an evolving body of useful information that is accessible to people as they come into the organization.

INFORMATION TECHNOLOGY

OVERVIEW

There is great need for a database for any organization that deals with either products or customers, due to the huge amount of data that needs to be stored. However, the database needs to be reliable and easy enough to be used by people with different background in technology.

***Finding 13:** Leslie employees do not trust CIVI database*

There were a lot of negative responses that the team received from the employees about the CIVI database. The

“There are so many different buttons to click!”

most common complaint is that CIVI’s interface is complicated and confusing. One employee mentioned that “there are so many different buttons to click!” This leads to mistakes like repeated survey emails being automatically sent to former participants. Due to these incidents, most of the employees do not trust CIVI and would rather not use it for fear of future mistakes happening.

Finding 14: Complicated database leads to the use of alternative methods

Due to CIVI’s complex functionality, many staff members choose alternative methods to complete the tasks that could be done using CIVI. Since not all employees are comfortable using CIVI, different people choose the method that they are most comfortable with to complete the task. For example, employees who receive payment for a program can input participants’ credit card numbers into another database called NEON. This database is connected to a credit card processing service called BluePay. Employees know that there is a way to perform the same task in CIVI but it has not been set up yet.

Finding 15: Adequate training is not provided to other staff members

Training sessions are frequently provided by companies or organizations as part of the employees’ professional development initiative. This is important for the people around the organization to improve their skill set and make sure that they are comfortable enough to complete their tasks. Part-time educators and employees at Leslie were given basic training on CIVI when they first joined the organization. There was no additional training given after that, making it harder for people with no previous experience in the database to be able to perform their job consistently.

DISPARATE TECHNOLOGY APPLICATIONS AND USES

Before fundraising software, personal computers and networks, nearly every nonprofit had to rely on paper files and the collective memory of their staff. Now, large-scale technology and cloud computing are the norm. However, due to limited resources, many nonprofits are stuck between the past- and the present-tense of technology. Leslie is somewhere on this middle ground, disseminating information between paper files, Excel spreadsheets, and two different database systems - none of which serves all of their needs.

Finding 16: CIVI Does Not Fit the Needs of the Organization

CIVI is a major challenge to the functions of Leslie. This was expressed throughout all of the interviews and often several times in a single interview. But little effort seems to be made at improving the situation. When we asked about what was going to be done with CIVI, the interviewees reported that nothing was planned. There were several ideas thrown around in different interviews as to what the fate of CIVI was going to be, but despite the diversity of ideas that were provided, there is no current goal.

Many employees have such difficulty with CIVI that they refuse to use it or only use it as little as possible. This makes the jobs of the employees that have to use CIVI even harder to justify, as data entry into CIVI serves little purpose beyond tracking attendance (which could be done in a spreadsheet and would likely be more practical considering the dissatisfaction among the staff with CIVI). Furthermore, the employees have either stopped attempting or are not interested in developing solutions to make CIVI work better for the organization. It appears that even if CIVI could be updated to provide more benefits or function more satisfactorily, the employees and administration would still not want to invest in the product. The employees have expressed a feeling of being stuck with CIVI because there are few monetary resources that can be invested into improving CIVI or purchasing a new database.

By contrast, the NEON database is well-liked among the staff, but it is used less often by employees. NEON does what CIVI cannot do when it comes to school programs, collecting payments from users on the website, managing memberships and donations, and tracking public program enrollment. But CIVI remains the primary system from which reports are generated. Because the two systems are not integrated, resources are wasted shuffling data between the two systems, i.e. “dummy” copies of programs that are independently maintained in NEON must be added into CIVI to manually track attendance and scheduling. Furthermore, multiple payment methods and processes have to be maintained to accommodate both systems and the breadth of programs that are maintained across them both.

TECHNOLOGY INFRASTRUCTURE SUPPORT

Technology infrastructure support is common in any organization or industry. Information technology support systems are responsible to maintain the IT systems within that organization. They help people with different levels of comfort with technology within the organization to solve their computer-related problems.

Finding 17: Leslie does not have IT support

Given that IT support is common in every organization, it is surprising to note that Leslie does not have an IT support system in place. It is hard for Leslie to move forward without this system because much of their work revolves around the CIVI and NEON databases. In order to standardize their work with CIVI in particular, Leslie needs to seek help from IT support to maintain and develop the database. Furthermore, because not all Leslie employees are tech-savvy, this support is extremely important so that the data can be properly maintained, accurate, and updated regularly. Given that CIVI contains former customers’ data, this data can be used to reach out to them and inform them about new and upcoming events that they might be interested in.

But due to CIVI’s functionality and the non-existent IT support, Leslie is not able to utilize the data that they have to attract more customers or to solicit feedback from their customers to improve future events. Another major problem that arose due to the lack of IT support is that the employees might not know if their past customers’ stored data is accurate or not. This is because over the past three years, nobody has managed or updated the data in CIVI. Many employees have complained about using CIVI but any improvement plans have been put on hold due to the lack of IT support.

It is clear that Leslie employees have different capabilities and comfort levels with their technology. There are some tasks that can easily be performed in CIVI but due to the lack of IT support, many employees do not know how to implement them. For instance, they are using Neon, BluePay and Quickbooks to keep track of payments made by program participants instead of CIVI. An interesting quote from one interviewee that described this situation is, “If someone became specialized in CIVI, it could work. But no one has that role now.”

Finding 18: Leslie employees have different comfort levels with technology

Another problem that arose from the differing comfort levels with technology is that not all employees use Google Calendar. Some people prefer email, text messaging, or phone calls to keep track of their activities over Google Calendar. Thus, no standards were introduced for internal communication. There is also a concern over hurting the morale of the workplace. Since there are a few employees who do not update their respective Google Calendars, this causes problems for other employees if they have any important questions related to a project that a member is currently working on but cannot be found on the grounds.

RECOMMENDATIONS

SHORT-TERM

- 1 Contact IT support and communicate Leslie's short-term needs and goals, especially concerning CIVI. Agree on a mutually beneficial contract and timeline to accomplish these goals.
- 2 Consider working with U of M to hire technology interns to make the Center's databases work better for the organization. Some possible candidates include computer science students or students from the School of Information.
- 3 Hold training sessions on how to better use CIVI during weekly staff meetings.

LONG-TERM

- 4 Identify, develop long-term IT goals; find or continue to use IT Support that can meet this vision.
- 5 Create a development strategy to raise funds for an upgraded database that fills all the needs of the organization.
- 6 Develop or reproduce training documents for staff to better understand CIVI database.
- 7 Restructure and standardize the payment systems in CIVI to reduce the number of steps taken to verify a payment or donation.

CONCLUSION

Leslie Science and Nature Center is an organization with much to offer to the Southeast Michigan community, including children's summer camps, school programs, public wildlife programs, raptor education, and miles of hiking trails, streams, and wilderness tucked away in a natural preserve in town. Leslie's staff and administration are dedicated to their jobs and it is obvious that they love what they do. Like most small businesses and non-profit organizations, the individuality, dedication, and care of the staff keep Leslie going through dynamic cycles of external environmental pressure and reward.

Over the last several years, Leslie's customer base has increased and as a result, it has increased the amount, size, and diversity of programs they offer. However, as Leslie has scaled up their programs and attracted more customers, the internal business processes have lagged behind, and so have revenues. Where once a single employee could schedule programs, answer phones, and be in charge of accounting, two people now fill this role when three or more are actually needed. Business processes, technology, and employee roles that once met the organization's needs have not evolved to meet the growing demands of the business. Revenue is declining because employees are overburdened with day-to-day operations and are unable to focus on organizational investment tasks such as grant writing, reaching out to donors and members, or developing a strong base of volunteers. Leslie is caught in this vicious circle of building the organization to gain resources, but building the organization is draining resources. There is a feeling across the organization that time and money are scarce, but finding more of either is difficult.

Therefore, while developing recommendations for Leslie, we wanted to remain sensitive to this discovery. Undoubtedly, the areas that we identified for improvement could be fixed with enough time and money. But at Leslie, time and money are limited and precious. For these reasons, our recommendations for Leslie are laid out in short- and long-term goals/tasks for the organization to pursue. Short-term recommendations were designed to require few resources, whereas long-term goals were developed with greater temporal and monetary resources in mind. This was done with intention, as we believe that a few short-term changes could improve Leslie's long-term outlook. Furthermore, Leslie has a great set of tools and public support to help the organization make incremental steps toward improvement.

Working with Leslie has been an enlightening experience for us as a team. We hope Leslie will find as much benefit from this report as we received through writing it. We all wish Leslie the best of luck in moving forward.

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