

# **Status Report**

## **Fellowship Management System (FMS) Database Development and Support**

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## Project Overview

The FMS software has been designed to help manage the Fellowship's readership data. This is the most rudimentary function of any database or spreadsheet. The bigger goal of this development effort, however, has been to accomplish the following higher level needs:

- Create and/or preserve various professional-grade business processes and procedures established by, or implied within the UBF's mandate to
- expand the readership of the Urantia Book,
- increase participation in UBF and UB-related outreach and service,
- develop a broader, more meaningful Urantia-based community, and
- enhance the UBF's capacity to fund and manage these undertakings.

While FMS development has continued over this past year, the priorities have been mostly maintenance related (i.e., the fixing of minor software bugs, the submission of ad-hoc reports, etc.) Needful tasks that did not necessarily advance the greater mission of the work. In short, there are significant, even crucial elements of the project and the program that have been largely ignored due to budget restraints.

## Work Completed

The majority of FMS software development (and its main functionality) was created prior to the current period. As stated, the majority of this past year has been spent performing software maintenance and support:

1. Software 'Bug' Fixes. FMS development has loosely followed what is known as RAD (Rapid Application Development) principles. It is closely tied to 'the customer' in that feedback is quick, and development time is much shorter. In this instance, that also means there is no dedicated staff doing 'exhaustive' testing. The software needs users, and these users provide important feedback. As FMS is 'rolled out' to more and more uses and users, the lag time will narrow. Ultimately, this approach saves a significant amount of time and money.

2. Ad-Hoc Reports. Over the course of the last year there has been an on-going stream of requests from UBF staff to generate custom reader lists and the like for various groups and initiatives. This became a significant time issue, and was addressed in the manner described in #4 below.
  
3. General Technical Support. There was a periodic need to research and fix certain hardware/software issues unrelated to FMS maintenance and support. For example:
  - Microsoft Remote Desktop. Various client/server settings had to be refined for users to successfully access the server where FMS resides. In addition, users had to be set up to allow for simplified file transfers between the server and the local computer.
  - Server printer issues. A major problem to solve was finding a way for users to work with server files while retaining the ability to print locally.
  - General hardware and software troubleshooting.
  
4. Development. There were several occasions where new functionality had to be created to solve significant business issues:
  - Ad-Hoc Report Generator. As described above, the frequency of requests for custom reader lists, etc., necessitated the creation of a more permanent solution. Over time, and in accordance with the changing characteristics of the requests, a solution was created that gives users a great deal of control in searching and exporting UBF material. Some refinement remains to be done to embrace an even broader set of possibilities.
  - Date Handling. There are many types of records in FMS that rely on years and date ranges to process or display information in a relevant way. Because so much of this material was both nonexistent AND critical, it was necessary to build certain database mechanisms to evaluate information 'in time' and relative to other unrelated data. This ultimately suffered from a lack of precision amidst an ever changing information landscape, and a more robust and detailed approach was needed. This FMS enhancement will eventually save the UBF a great deal of money as it has the added side benefit of simplifying certain future programming efforts.
  - Reader Society History. The assignment of reader societies as a single one-to-one relationship proved to be, while simple and expedient, too narrow relative to the complexities of the UB movement and the FMS software. A mechanism was need to allow for individuals to change associations, and just as important, to separate from them. This enhancement brings greater accuracy to UBF data, and preserves vital historical details for past and future information.

## Work To Be Done

There are a number of larger initiatives waiting to be completed or begun that will have an impact on the overall efficacy of the FMS system. These projects include, but are not limited to:

1. **Administration.** The FMS System Administration section covers a wide range of vital UBF /FMS functionality, and is now only about 10% complete. The remaining programming efforts include the following:
  - Integration of FMS data with **QuickBooks**. As now constituted, FMS and QuickBooks data sets are maintained separately. This results in a considerable loss of productivity, data quality and usability. To correct this, the next phase of development should include
    - the sharing of names and contact information. Purchases and donations originating or downloading into QuickBooks will use existing FMS reader data to complete transactions.
    - reconciliation of existing data. A mechanism is needed to link past, unassociated QuickBooks transactions with FMS readership. This will also include the capacity to transfer QuickBooks-side entries to FMS reader data where such customers /donors do not exist.
    - the design of a process whereby web transactions can be
      - tagged by category and purpose.
      - automatically downloaded into QuickBooks.
      - automatically transferred from QuickBooks to the FMS software, as necessary, and with the desired categorization.
      - maintained in FMS relative to Restricted fund transactions.
  - **Web Data Management.** Another critical, and heretofore unaddressed functionality is the managing of the flow of information to and from the UBF's website:
    - **FMS data uploads** for use on the website will provide the readership vital, and current, information on
      - the organization.

- fundraising options and goals.
  - outreach tools.
  - service opportunities.
  - societies.
  - study groups.
  - reader connections.
  - event announcements.
  - detailed conference information.
  - various initiatives.
- **Website data downloads** to FMS will reduce UBF staff workload, and provide for a more timely delivery mechanism for
    - reader contact information.
    - initiative updates.
    - event and calendar announcements.
  - **Import /Export mechanisms** required to meet web management goals will include
    - client and server-side triggers and processed for
      - cloning FMS data.
      - conversion to server-based MySQL.
    - various non-FMS layers of security.
    - software and hardware enhancements to user access.
  - The **FMS Communications Console** is another currently back-logged, but strategically import administrative function. In time this feature will become the heart of the system, providing UBF staff unique and rapid communicate tools:
    - Pre-designed mail/email **templates** by type of communication for
      - General Council communications.
      - targeted fundraising.

- society and study group announcements.
  - service and community opportunities.
  - general readership contacts.
  - Multiple, user-defined **contact filters** by:
    - group /organization
    - zip code
    - city
    - state
    - country
    - or even manual reader selection.
  - System **Reminders** will allow staff to program various activities that need to be done on a recurring basis:
    - FMS and QuickBooks data transfers.
    - FMS uploads to web.
    - website downloads.
  - **Administration Reports** are critical to the health of the system, and are kept separate from the main report functions for security purposes. They are designed to make rapid identification and correction of data errors and exceptions:
    - **Exception Reports** for
      - reader contact information.
        - emails
        - phone numbers
        - zip codes
      - geographic designations.
        - cities
        - states
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- countries
    - regions
  - **Data Analysis Reports** for
    - user security.
    - duplicate readers.
    - duplicate addresses.
    - reader status.
    - international reader & language.
2. **Reporting.** Virtually all standardized, recurring UBF reports have to be designed and programmed, along with the major FMS report functions. The following is a list of basic requirements, but is by no means exhaustive:
- The current **Report Screen** is for the most part a place holder for future development. Aside from the Ad-Hoc report generator previously discussed, it is one of the most important features in this or any database program. Design must be completed, and include the following:
    - A mechanism for report categorization. There will be many reports created over time, and the absence of this feature will lead to much confusion, lost time and wasted effort.
    - Category filters. Each grouping of reports will require its own type of filtering system. For example, participation information such as service projects and donations may be important when filtering readership reports, but will be incidental to publishing standard General Council information.
    - Categorization and filtering must be tied together, and exposed in the administrative tools to enable UBF self-management.
  - **General Council Reports:**
    - Current General Council – to include the councilors for the 3 current classes, as well as officers and committee membership.
    - General Council by Year – same as above selected by year. This will serve the purpose of auditing archival data.
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- General Council Mailing Labels – to facilitate communication.
  - Executive Committee Mailing Labels – to facilitate communication.
  - Standing Committee Mailing Labels – to facilitate communication.
  - Voting and Issue Report templates – to standardize and accelerate the meeting of GC business requirements.
- **Society Reports:**
    - Society Audit Report – for initial and periodic use to capture missing data such as emails and contact information, as well as to discover readers and levels of participation otherwise lost.
    - Society Membership Directory – to assist and encourage society-level membership and management, and to accelerate the exchange of information with the General Council /FMS. Such a directory can also include such data as officer, General Council, committee, even Foundation contact information. All things that can serve the needs for greater Urantia Book reader connectivity.
    - Society Historical Report – to encourage the audit of historical data such as officers and membership and, as a consequence, the readership data these records rely on.
    - Society /Officer Mailing Labels – to facilitate communication.
  - **Study Group Reports:**
    - Study Group Audit Report – similar to the society report above. Groups, leaders, locations and contact information must be brought up to date. Especially of interest will be the capturing of data relating to current activity status, and the group membership ranks. This is the report most likely to unearth reader participation and projects currently unknown to the Fellowship.
    - Study Group Directory – the study group version of the society report. Providing tools to group leaders and readers not only simplifies leadership efforts, it encourages participation in a broader range of activities, and helps create the cosmic glue that solidifies UB community.
    - Study Group /Lead Mailing Labels – to facilitate communication.
  - **Reader Reports:**



- UB Readership Report by Location – formal version of an ad-hoc report that can be used to help ‘manage’ the movement. Calculate the number and dispersion of readers world-wide, and show expansion and contraction trends within overall readership.
  - UB Readership Growth Report by Date – similar to the above, but with an emphasis on YTD and annual readership comparisons. For example, such a report will show readership and/or membership ranks as of June 2009 relative to June 2008, 2007 and so on. 1/5/10 year trends that calculate readership based on entry into FMS, membership relative to society roster dates, and status changes such as Active, Inactive, Graduate etc. A powerful tool to truly gage the effectiveness of UBF outreach, and the direction of the movement.
  - Readership Activity Report – a quick way to assess reader involvement in various initiatives, such as service projects, outreach programs, fund raising, etc.
- **Fund Raising Reports.** There is currently a rather shocking absence of professional, automated reporting tools for this vital UBF function. While the reports on this list barely scratch the surface of financial reporting and analysis potentials, their inclusion will be found to be transformative:
- Restricted Fundraising Report– the current status of earmarked donations, and payouts relative to same.
  - YTD Fundraising Report– the current fundraising status.
  - YTD Fundraising Report by Date – show fundraising efforts over time.
  - Fundraising Report by Location – compare donations by various geographical designations. Use this report to help cultivate regional and international support.
  - Fundraising Report by Initiative – find out general and restricted fundraising status, what needs more emphasis, and what plans are not working.
- **Misc. Reports and Categories:**
- Service Directories.
  - Event Calendars.
  - Conference Planning.
  - Connecting Readers.

- Announcements, etc.
3. **Event Planning and Calendars.** Use existing FMS reader information to help UBF staff construct
- **Conference** and Meeting plans to manage
    - schedules.
    - speakers.
    - seminars
    - attendees.
    - payments.
  - Event **Calendars** to help the Urantia Book movement inspire and leverage participation, cooperation and community around the world.
4. **Service Projects.** The Service Project section of FMS is on-going, and is entirely volunteer-driven. Many of its benefits, such as connecting readers in the performance of special projects, the creation of internships, as well as a way to get administrative help for the Fellowship, however, must await the completion of key segments of the application. Only then can the idea of volunteerism get tested against real-world situations.
5. **Information Management.** The requirements for the success of the FMS software in UB /UBF management will not stop at its timely completion. There is much implementation to be done including, but not limited to
- an audit of existing organization structures.
    - **Societies** and their officers must be contacted to ascertain their current status and plans.
      - Are they active or inactive?
      - Do they have current membership roles?
      - What do they need from the UBF?
    - **Study groups** likewise need to be contacted to find out
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- active status.
  - current leads and contact information.
  - where and when they meet.
  - the type of group, i.e. consecutive, topical, etc.
  - open or closed group?
- an audit of **international structures**. What is the movement doing abroad? Wherever there are readers, there is an opportunity to uncover other readers and groups – regardless of their nature.
  - an audit of **organic, informal structures**. There are likely a number of associations that defy classification. One example is the “UB Youth” group that recently had a conference in Boulder, CO. This investigation can lead to many useful insights on the direction of the movement.
  - a complete audit of the Urantia Book **readership**. Using the above groups when possible, conduct a full international audit of the readership with an emphasis on acquiring
    - email addresses
    - phone numbers
    - mailing information, and
    - reader status.
  - **the sharing of UBF information services**. It is important to convey to the movement the expansion of UBF information and tools that can help them do more, and better. Directories, service processes, event calendars and the like – all such offerings can help make these efforts much more likely of success.

## Cost Estimate

During the recent IT Summit meeting, the cost of doing the mission critical work described in this document (minus event planning, information management and misc. reports) was put at \$50,000 or 1,250 hours. This is approximately 7-8 months of work. I find this a reasonable time and cost expectation.

An alternative suggested recently could result in significant savings. A long term agreement could be created to include the above development work, future development work, database maintenance, information management and various aspects of IT coordination for less than the \$50,000 stated. Costs would be constant, and work would adjust based on the annual amount.

## **Conclusion**

Much progress has been made in the last two years creating an integrated software to drive the management of UBF activities, and the advancement of the Urantia Book movement. There is, however, much to be done. It is as if an engine has been designed and installed, only to leave the car on blocks for lack of tires. The work needs to be completed, and not just for the sake of what hasn't been done, but for the effort and resources put into what has. FMS is a comprehensive software that can dramatically impact the future of the movement, but like any software it must be finished, installed and used to its fullest.