IT Strategic Assessment Report

3/Dec./2024

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# Executive Summary

This paper aims to analyze Lucky Cat Café and discover the areas for improvement in IT. A non-profit organization with limited resources requires maximum efficiency to sustain its business. Not all users at Lucky Cat Café are technology experts. Thus, the technology should be easy and intuitive to use. Otherwise, misaligned IT resources within the organization may cause unnecessary trouble. Analyzing its business operations, organizational goals, and technology inventory will reveal the optimal environment.

# History and Purpose

## History of the Lucky Cat Café

Lucky Cat Café was founded in 2018 by two retired teachers, Karla and Gale. The founders funded themselves with the project to bring the community a place to help homeless cats. They utilized their connections to ease up the establishment. The founders worked with partners they knew well, enabling Lucky Cat Café to quickly become a home for cats waiting for a new family.

In 2021, BJ Wysoske began her volunteering at Lucky Cat Café as a cat petter. She then started to take care of newsletters and websites, expanding her role and responsibility, and became the new executive director the year after. Around Aug 2023, Lucky Cat Café faced financial challenges that nearly terminated its business. Thankfully, rescue group partners raised money, and Lucky Cat recovered from its critical status.

## Purpose of the Lucky Cat Café

Lucky Cat Café serves a crucial role in the community. One of its main goals is to provide a safe environment for cats before they find their new home. Although animal rescue offers a safe place to stay, it may not be the most comfortable place for cats. Cats in shelters have limited opportunities to meet their potential adopters, making it challenging for them to find a new family. Lucky Cat Café solves this problem by being an intermediary between the adopter and the animal rescue. The concept of a café provides easy access to people while being cozy and friendly to the cats.

# Management and Business Processes.

## Reduce the stress of local partners

The first and foremost process at Lucky Cat Café is finding a cat. To accomplish this, Lucky Cat Café works with five local partners — Louisville Metro Animal Services, Shamrock Foundation, Little Orphans Kitten Rescue, CatHeads Kitty Rescue, and Humane Society of Oldham County — to source their cats.

These organizations specialize in providing animal rescue and shelter. However, due to the large number of homeless cats in the area, the shelters experience a shortage of space. Lucky Cat Café steps in here and takes care of some cats, reducing the burden from their partners while providing a better environment for the cats.

## Connect new owners with shelters

The second process aligns with the organization's purpose, finding homeless cats a new family. The adaptation process may happen anytime throughout the year. Once a visitor decides to adopt a cat, they sign a form, and it goes through a verification process. During this process, one of the shelters listed above that manages the selected cat confirms if the applicant meets the requirements for an animal adoption. Once approved, with a $150 adoption fee, the cat is handed over to the new owner.

## Receive donations

As a non-profit organization, part of its business heavily relies on donations from the community. On top of regular monthly or one-time money donations, Lucky Cat Café also receives cat food and supplies from the people around. From time to time, there are sponsors and campaigns to raise funds. During regular visits, the visitors may donate an entry fee to help the organization. Donated goods and supplies are used during regular operations or sold during events to gather more funds.

## Educate the community

People who have never had a cat before may lack some knowledge about them. Lucky Cat Café serves the community by educating the visitors about cats. Cats are among the most common pets, yet they differ from other animals. To ensure cats stay healthy and safe, one must understand their characteristics. The volunteers at Lucky Cat Café assist the visitors with questions and provide them with thorough information.

## Host cat events

Lucky Cat Café provides various activities for the local community, allowing them to spend unique time with cats. Such activities include art and yoga classes done with cats. People who want to have a good time with cats may join these events or become a part of an organization by volunteering. Lucky Cat Café primarily runs with the help of volunteers. Even the executive director once also started as a volunteer.

# Current IT Environment

## Hardware

Lucky Cat Café uses a simple set of hardware to support its operation. The devices include an iPad, a computer, and a card reader. The iPad handles most tasks at the reception, and a card reader takes the payment. The computer handles the backend and the core of the business.

## Software

For software, multiple tools sourced from various providers powers Lucky Cat Café. Acuity Scheduling is used to book visits and make appointment payments. At the reception, a POS software SwipeSimple works with an iPad and a card reader, handling sales of goods. Waiver Sign is a program used to let visitors sign their waiver forms, since the cats may cause unintended injuries. A set of Intuit tools, Mailchimp and QuickBooks are also used to handle emails and accounting, respectively.

## Staff IT Skills/Training

Overall, the skills of the staffs are very basic. There is not yet a dedicated training to educate staffs with their IT knowledge. Some core functions are introduced by word of mouth, but they are limited and happens on an on-demand basis.

## IT Budgeting and Spending

Lucky Cat Café spends every month around $60 to $70 for Acuity, $60 to $80 merchant fee plus a transaction-based fee for SwipeSimple, $120 to $150 for Intuit account which includes Mailchimp and QuickBooks, and $75 for Waiver Sign. There is no managed budget for IT, and Lucky Cat Café pays the fees as they are billed.

# Envisioned IT Capabilities – work in progress

## Leadership’s Vision

The executive director of Lucky Cat Café has a vision to implement multiple ideas to improve the operation. Some ideas include a membership system, inventory management, and project management. After experiencing a financial crisis that almost led the organization to terminate its business, BJ Wysoske wants to find and implement features that could solidify Lucky Cat's position. The organization generally lacks a technological management system, leading to potential inefficiencies. Many issues result from a lack of computerization, and proper implementation seems to solve these issues.

## Top 10 Technology Issues

The first issue related to technology is the cost. Due to Lucky Cat Café’s limited budget, there are limitations on which technology it may use. As a result, all improvements must take account of budget constraints and the following. On a side note, Lucky Cat Café is expected to break even this year, potentially allowing more allocation towards technology. However, to maximize sustainability, prioritizing all cost-saving options is the key.

The volunteers at Lucky Cat may experience difficulties utilizing technology. There is a lack of systematic approaches to train and manage the users of its technology inventory. No one is assigned to develop and manage training resources. As of now, volunteers train each other on an on-demand basis. The inconsistency across volunteers' skills and knowledge may affect the quality of training. Many of the volunteers have no background in technology.

Managing technology inventory is another issue. Even though the primary equipment at Lucky Cat Café is an iPad, there is no system or person to manage it. The device is left unmanaged at the reception with other equipment. Faith is set in the volunteers to handle the equipment well, and there is no monitoring.

With the iPad and the software that Lucky Cat is using, there is no way to customize the dollar amount for tips. The app usually allows a certain percentage to the total amount, where the visitor often wants to donate a specific dollar amount. This mismatch in the amount discourages the visitors from donating, losing many potential donations.

Pet supply inventory management is a challenge. Pet foods, drinks, and other related supplies are often donations from the community. Unfortunately, there is no way to track these. Resources are not managed digitally but only through a human eye.

The primary source of income is through donations, but again, there is no way to keep track of the donor. The leadership has the vision to implement a rewards system, but the lack of membership management makes it difficult to develop this system. Through Bloomerang, a fundraising platform, Lucky Cat Café has around a $6000 annual budget. The leadership wants to manage and reward these people systematically. Currently, it is managed through Microsoft Excel with manual input.

Although Lucky Cat Café attempts to host various offline events, such as Cat Yoga classes, an obstacle to this is technology support. Management of the schedule and tickets and communication with their supporters is a serious challenge. These are often done in analog, making it difficult to track them. There is also no tool other than their base equipment to support these offline activities.

One area that needs improvement is follow-up with the supporters. The leadership wants to follow up with their regulars and visitors with a thank you email, but this feature is absent from the organization. BJ Wysoske has a desire to keep in contact with the supporters and reward the regulars, but the technology is not implemented to fulfill these needs.

The services that Lucky Cat Café uses are from various providers. Decentralization leads to a problem that is difficult to manage in one place, and the spending is scattered and possibly wasted. The organization needs an integrated way to manage its operation in one place, if possible. A unified management will streamline the process and save the spending on IT services.

# Closing the Gap

## Recommendation 1

The first recommendation is to use the extensive features of Bloomerang. Although Lucky Cat Café already uses Bloomerang for fundraising, some advanced features of Bloomerang support volunteer management, membership management, and marketing. Marketing features include email tools that may send follow-up emails to its supporters. This simple and centralized solution solves multiple issues listed above. Not only that, since it is based on the platform Lucky Cat Café is already using, there is minimal need for transition.

## Recommendation 2

For the inventory management for pet supplies and other merchandise, Sortly may be a good option to consider. It has a free plan that can already suit most needs for Lucky Cat Café and it's easy and intuitive to use. Although it is possible to use free tools like Google Sheets or Microsoft Excel with macros, that may be difficult for other volunteers to keep up with it. Sortly is easily scalable and has multiple pricing plans to better customize according to various needs and situations. One of the best features is the ability to generate QR codes or labels, which makes the process much easier.

## Recommendation 3

For the payment system, Stripe or Donorbox may be good alternatives. They offer cheaper transaction fees compared to SwipeSimple, making it possible to reduce the IT budget. Donorbox has a plan for non-profits, which may be beneficial for Lucky Cat Café in the long run. Stripe is widely used across the industry and is compatible with most of the services. In addition to the recommendation for booking and waiver, the following services are compatible with Stripe integration, which makes Stripe a much more appealing choice.

## Recommendation 4

Appointment booking and waiver signing may unify into one process with SimplyBook.me or Setmore. These services offer better prices than Acuity Scheduling, while they both support payment integration with Stripe. Integrating similar processes like booking and signing may be a simple yet effective solution to streamline the process both for the visitor and the organization. By doing so, Lucky Cat Café may save big spending toward Acuity and WaiverSign.

## Recommendation 5

There are other all-in-one solutions for non-profit organizations. Neon CRM is one example, allowing the organization to manage everything in one place. From events to supporters, operations, and fundraising, Neon CRM offers the ability to manage everything necessary for organizations. One downside is the pricing. While it provides the convenience of controlling everything in one place, the monthly fee for the service easily exceeds the combined budget of all other services.

# Conclusions

Lucky Cat Café seeks ways to improve its operation by improving its technology. Based on the circumstances and needs, I believe using multiple services is still required to keep the price down compared to an all-in-one solution. However, some services, such as Bloomerang, offer advanced features that could replace other services, such as Mailchimp, while satisfying additional future needs, such as membership management. The same applies to other services. Cheaper alternatives may replace, combine, or extend the capabilities of current services that Lucky Cat Café utilizes. However, the transition process may involve a learning curve for its users and may introduce potential compatibility issues. Thus, all options must be thoroughly analyzed before any changes.