IT Strategic Assessment Report

12/5/2016
Alaa Hawsawi

Revision History

Date	Version	Description	Author
11/19/16	1.0	First Draft	Alaa Hawsawi
12/5/16	2.0	Final Draft	Alaa Hawsawi

Table of Contents

1.   Executive Summary

The purpose of this document is to collect, analyze, and define the high-level needs and features of Hope Scarves. It focuses on the capabilities needed by the stakeholders and target users, and why these needs exist. Hope Scarves is a non-for profit organization based out of Louisville, Kentucky that aims to capture the stories and courage of those who have dealt with, and survived cancer. Those who have gone through having cancer and survived pass on their story and courage through the Scarves that they wore. Individuals dealing with cancer wear the Scarves of survivors, using their story and courage as a source of hope, and motivation. Hope Scarves essentially says "these people have done it, you can do it too", and the Scarves people wear daily are a constantly reminder that they can get through it. Hope Scarves has reached people of all ages, and ethnicities all over the world and continues to expand exponentially. This document will break down the organization and offer recommendations that can help the organization reach its goals effectively and efficiently.

2.   History and Purpose

2.1   History of the Hope Scarves

The Founder of Hope Scarves is Lara MacGregor. MacGregor was first diagnosed with breast cancer in 2007 at the age of 30; at this time, she was 7 months pregnant with her second son. A woman she never met, but with whom she shared a mutual friend with, sent her a package. Inside were beautiful scarves she wore during cancer treatment and a note saying, "You can do this." The scarves were both practical and

inspiring. And, knowing someone else had worn the scarves and faced cancer helped Lara believe she could do it too. Not long after Lara finished treatment, she went to a Young Survival Coalition Conference. Lara packed several scarves in hopes that she could pass them along to another woman, as had so graciously been done for her. There, Lara met Roberta and they laughed together as Lara showed her different ways to wear a scarf. Upon the completion of her treatment, Roberta sent the scarves back to Lara. Lara had since moved and one of the first friends she met was starting treatment. Lara brought over a scarf to Brooke's house and they laughed through their tears about what it was like to lose your hair. This whole time Lara could not stop thinking about the amazing journey these scarves were on.

Therefore, Lara created Hope Scarves in 2012 as a way to capture these beautiful stories and encourage others. The program started in Lara's spare bedroom with her toddler volunteer by her side, sending out 2-3 Hope Scarves a week. Today Hope Scarves is a bustling office of volunteers and staff, sending nearly 50 scarves a week all around the world. Hope Scarves has sent over 4,500 scarves to every state in the country and 12 foreign countries, to people facing over 85 different types of cancer. The oldest recipient is 92 and the youngest, 5. The Hope Scarf Collection, which changes constantly, contains over 5,000 scarves and over 500 stories.

After almost 7 years cancer free, Lara faces a new twist in her journey with cancer, as she was diagnosed with Stage IV Metastatic Breast Cancer in January 2014. Lara started Hope Scarves to spread hope, which she is now holding onto more than ever. Leading Hope Scarves allows Lara to live out her passion to help others facing cancer.

2.2 Purpose of the Hope Scarves

Fighting cancer is, in essence, a very scary and challenging fight. It is a fight for one's life. To make matters worse, the chances of survival (from the mouth of a physician) is up in the air. It takes a lot of strength (mental and physical) and hope to successfully fight cancer. Hope Scarves aims to make the fight cancer a little less scary; it gives those with cancer a little more hope in their chances of survival, and gives people the motivation to try their very hardest and not to give up. Hope Scarves is not just for Survivors and those undergoing treatment, but also loved ones. This is accomplished by collecting stories from Survivors along with the Head Scarves they wore during their fight, and then sending these headscarves and stories on to others. Even if Survivors are not comfortable sharing their stories or personal information, they are still encourage to donate their garments, if they would like. Even if no story, on paper, is attached to the scar the fact still remains that it was worn by a survivors who thought it would be meaningful and useful for someone else to wear during their fight. Even people who have not survived cancer may donate garments. Communities, schools, churches, etc have held drives for scarf donations.

Hope comes in many forms, and essentially Hope Scarves is a another unique approach to providing hope, to those dealing with cancer. A unique feature of Hope Scarves when compared to other resources for cancer victims is that it a garment sits atop one's head. This is significant because many cancer victims lose their hair during treatment.

Hope scarves are personalized in that the story and style of the scarves match. Anyone who is undergoing treatment can request a headscarf as absolutely no cost. Loved one's can also request a Headscarf to send to someone, and may also give a donation for translational research. Head Scarf is a completely non-for-profit organization and all donations aid with research and the organization's operations.

3. Management and Business Processes.

The Management and Business Processes of an organization describe the activities performed to accomplish a specific organizational goal. These are the processes for Hope Scarves.

3.1 Community Donation

Hope Scarves relies on donations from anyone in the local and broader community who cares, and would like to help. Most of the donations to the organization are in the form of scarves. Hope scarves calls it "In Kind". The "in kind" budget for 2016 is $42,000. They have a good number of scarves from cancer survivors but the majorities are donated from companies, organizations, community groups, and independent donors. In fact, many Companies (that have an inventory of Scarves) donate their extra Scarves to Hope Scarves.

3.2 Buy Scarves

Hope Scarves will occasionally purchase scarves when they get request from recipient but the scarves they have do not adequately meet the request (e.g. they really need a pink Scarf and there is not one immediately available). Many companies are kind enough to give Hope Scarves discounts on what they need, and try to send it in a very

timely manner.

3.3 Volunteers

To carry out its daily business operations Hope Scarves relies entirely on volunteers. The volunteers perform various tasks and bring many skill sets to the organization such as: data entry, packaging, and spreading the word on Hope Scarves. We can entertain that many volunteers have careers; they not only take their free time to volunteers for Hope Scarves but they put the skills from their careers to use while volunteering.

3.4 Community Partnership

Hope Scarves benefits significantly from community partnerships such as, for example, hospitals and salons. Since these businesses and organizations deal with many people on the daily basis, a partnership helps spread the word they spread the word and help hope scarves with their mission. If we are talking breast Cancer alone, 1 in 8 women in their lifetime develop it. Therefore, we can see why it is imperative that the word gets out; because they are likely many women who can benefit from it.

Often it is not the patient who requests a Hope Scarf; it is the hospital that puts in a request in order to aid the patient in their treatment, that they know can be taxing. Hospitals typically purchase up to 30 packages at the time.

4. Current IT Environment

The current IT environment is the description of the organization's hardware and software, and inventory as the organization stands currently. The hardware consists of laptops, printers, shipping scales, shipping label printers, phones, Wi-Fi routers, physical

storage devices, and anything other physical piece of technology that is used to improve the operations for Hope scares. Software consists of operating systems, computer programs, computer applications, Internet connections, digital storage and any non-physical technology that is used to improve operations for Hope scarves

4.1 Hardware

Hope scarves have a limited hardware inventory. The hardware inventory consists of

- Two "hand me down" MacBook pro.

- One personal MacBook pro.

- One "hand me down" MacBook air.

- One personal MacBook air.

- Two inkjet printers.

- Shipping scale.

- Shipping label printer.

- Six personal phones.

- Label scanner.

- AT&T Wi-Fi router.

4.2 Software

Hope Scarves' four Macintosh laptops are running "Sierra" operating system and one laptop is running "El Capitan" operating system. All the laptops run application such as office 365, a web browser, iContact for salesforce, QuickBooks plus, endicia, PayPal pro and run signup software. For phones, they use ring central.

- Office 365: Uses for writing documents and PowerPoint.

- Office exchange: Uses to share the files with each other.

- iContact for salesforce: Uses for Email marketing .

- Salesforce: Uses for fundraising management and database

- QuickBooks Plus: Uses for Financial management, tracking the inventories and sales receipt.

- Endicia: Uses for printing labels

- PayPal pro: Uses for payment from Hope Scarves' website

- Run signup: Uses for registration module

- Ring central: Uses to transfer the land phone line to their phone.

- Eventbrite: Uses to make events

4.3   Staff IT Skills/Training

Hope scarves haw a very limited number of staff members and volunteers. They are about six volunteers working part-time. Their schedules range from five to 25 hours a week. Some of the staff works from home and some work from the office. The office located in Saint Matthews Louisville, Kentucky. The volunteers can sign up for Thursday or Tuesday and perform tasks such as data entry and preparation for packages to be shipped. Every staff member is highly knowledgeable about what they are sending.

Hope scarves' staff can commutate with customers from anywhere, utilizing Ring Central. Volunteers are responsible for creating events such as those held at schools, churches, support groups, and book parties. Without the motivation and dedication of

volunteers, the organization would not be able to expand its operations, which would

be unfortunately for cancer victims who have benefited and could benefit.

4.4   IT Budgeting and Spending

Hope Scarves has IT budget, for the entire organization, of six thousand dollars per year.

This budget is used for the maintenance and support of technology used throughout the

organization. This consists of the paying bills (office space, electric, etc); renewal of

software packages, any services that are being purchased such as online domain name

payments. Hope Scarves does not have a significant budget for expansion and

improvement at this point. As the operations grows it may, in the future, be able to use

its budget to expand (marketing, more office space, staffing).

5.   Envisioned IT Capabilities

5.1   Leadership's Vision

Hope Scarves' leadership vision is to do their part to change the way people experience

cancer around the world. The organization hopes to grow the IT aspect of their

organization so they are able to communicate to people with cancer all over the world.

In addition, they are moving to a bigger place to the can have more volunteers to work

and spread the word. In the new location, they have three large rooms. The main room

will be a conference room, the room in the middle will be offices for the staffs who work

in-site, and the last room will consist of a workshop and small kitchen. The workshop

will be for design, processing orders, and preparing packages. Right now, Hope Scarves

has a business relationship with United State Post Office for pickup and delivery of

packages, but USPS is allegedly not doing a very good job. Therefore, Hope Scarves is pursuing a partnership with UPS because the accuracy and efficiently of their services is superior to USPS. In addition, they have a partnership with 'Dry Clear', who vows to wash scarves for free as they are sent in by Donors to Hope Scarves.

5.2   Top 10 Technology Issues

Hope scarves top ten technology issues consist of the following:

1) **Manual code enters:** Hope Scarves volunteers enter the scarf code manually which it increases human error, time consuming and misinterpretation. Some volunteers may have had little to no training before doing data entry. This isn't to say that basic Data Entry is difficult and requires expertise, but novice users with little direction is prone to serious error.

2) **Online search engine**: Hope scarves used to be one of the first pop up in the search engine but now with a lot of organization have the same mission and they are lower on the list of the results. The only ways for Hope Scarves to appear higher on the list is either: pay search engines, or go viral. The former options requires too much money, Hope Scarves cannot pay Google to stay high on the list. Going viral is not a matter of will; Hope Scarves must expand and get its name out there to gain notoriety.

3) **Uploading pictures for gift packages**: Hope scarves sends photo of the scarf to anyone requesting a gift package. The photo of the scarf is taken by phone; it is

transferred to a computer and sent to requesters via email. Sending pictures to and from people by phone may be alright for your friends, but the organization may want to improve this process including: higher quality photographs, a way to access them from an official website.

4) **Track inventory:** Hope Scarves does not have a strict inventory recording process. This is to say that there are some things in their inventory, that not everyone is aware exists. The exact number of items they have, color, etc could also be more organized. With a limited number of workers and orders that are personalized, it is imported to be organized; know what you have, where it is.

5) **Financial recorded:** The bank is responsible for telling Hope Scarves' its debt, and they work through their finances with the use of salesforce. It is not clear if the organization has anyone with financial or accounting knowledge working, or if they are just doing their best and taking it step by step. The point is, any organization that has to spend money could benefit from financial expertise. Especially if they have such a limited budget.

6) **Need of laptops:** Hope Scarves cannot provide new laptops to accommodate all volunteers, and they laptops they currently possess are not exactly top of the line.

7) **Review postage, shipping technology:** Hope Scarves not only pays a lot of money for shipping ($3 a package), they use the United States Postal Service which is: inefficient, erroneous, and expensive. The can elect to use a better shipping service and pursue cost vs. efficiency with those options such as UPS or

Fed EX. The challenge here for Hope Scarves is contracting a good shipping service with limited income.

8) **Scarf fulfillment process:** In terms of receiving orders, processing orders, preparing packages, shipping, etc...Hope Scarves has its issues. Part of it has to do with the fact that volunteers are only there for limited hours during the week. Organization could be another issue. Lack of Scarves. Lack of money to buy Scarves, as donations are not enough. Finally, volunteers are likely inexperienced with the responsibilities they have been given, and are learning as they work with little direction. If some or all of these statements are correct, there is no way an organization could run efficiently.

6. Closing the Gap

6.1 QuickBooks - Salesforce Integration by Workato.

Workato allows integration of applications. Workato will let you sync automatically between QuickBooks and salesforce in both direction without coding. Integrated apps are called "recipes" and you can create your own integration groups. Workato has a special price for non-profit organizations. They have a 30-day free trial with no credit card required. The base plan costs $99 a month. The community plan is free to use which allows you to do up to one hundred (100) transactions a month and you can only connect to "Tier 1" Applications. In addition, you can create any integration with a thousand (1000) other apps they support. For example, you can connect salesforce with Eventbrite.

6.2   **QuickBooks Online and Desktop Integration for Salesforce by DBSync / Avankia.**

DBSync will let you sync in sales order from QuickBooks to salesforce and vice versa. The free package will give you five transactions a day which, it is 150 transactions a month. The standard package cost $480 a year with 500 transactions a day which, 15,000 a month.

6.3   **UPS Smart Pickup.**

Hope Scarves eligible to get a one year free trial. It is daily pickup with the flexibility of requesting a pickup on demand. UPS will come to Hope Scarves and pickup packages with flat rate $11.50 per week. Smart pickup available from Monday through Friday. Smart pickup is a big time money saver. UPS Smart pickup will cost you ($11.50*52.1429 weeks a year= $600 a year) which $600 in two years since the first year is free. Right now, you are paying $3 per package and on average; you ship 35-40 packages per week. ($3*35 packages=$90) per week. Per month it will be ($90*4= $360) per year it will be ($360*12=$4320) $4320 is a lot of money. UPS smart pickup you will save $3720 a year. However, you will save $4320 in the first year.

6.4   **Scan Fizz for Salesforce.**

My first recommendation for barcode issue is a free app for Salesforce with a nice interface that allows you to use your IOS phone to scan barcodes, QR, and then upload it to salesforce. Salesforce can see your most recent scan, and the accuracy of shipment processing can more easily be verified and reviewed.

6.5   Vision-e Scan.

My second recommendation for barcode issue; It is a free app for Salesforce with nice interface that allowed you to use your IOS or android phone to scan barcodes, QR's, and then upload it to salesforce. Additionally it has voice scanning which allows you to record small memos. It allowed up to five users for the free version.

6.6   Barcode Scanner.

Barcode scanner will be my last recommendation for barcode issue. This is a more costly option as one has to buy the license, and you will have to use Microsoft Access save your data in a spreadsheet, and then upload it to a database.

6.7   Bring Your Own Device (BYOD).

Since Hope Scarves does not have the budget to purchase laptops and it is a volunteer organization, volunteers can 'volunteer' to use their own laptops while working in the office or at home. The risk here is keeping control of sensitive data and mixing personal business with work. For example, we know that many companies have a computer and internet usage policy. There are many reasons for these policies, but at the end of the task, there are things that do not belong in the work place. Despite this concern, I am confident that the volunteers have the maturity level to handle bringing their own computers to work.

6.8   Hope Scarves Advertising

I recommend for Hope scarves to sell T-shirts, cups and hats that have their name on them to spread the word so more people will know about it. In addition, it will increase

the "in kind" expenses

6.9   Search engine.

The more keywords associated with Hope Scarves, the more likely it is that a user will

stumble upon the website. Explore the list of words already associated with Hope

Scarves, expand it. Use other methods of advertisement such as YouTube (YouTube is

free), FaceBook groups, etc. Anything helps.

6.10   Story Selection

I recommend to rebuild the scarf database by add columns for story, color, size and the

type of cancer or build a new database that connect with scarf database. It will be easier

to find the scarf and the story that match the new request base on the type of cancer.

6.11   Upload scarf photo

I recommend Google Drive. Google Drive will give you 15 GB free space and you can

send the photo from a Gmail, other Email app or app you can share photo with on your

phone easily. In addition, it is accessible from the web browser. Google Drive works on

all phones, Android and IOS.

6.12   Connect the bank with QuickBooks

QuickBooks keeps track of all your ATM purchases and withdrawals, plus all direct

online funds transfers. Instead of methodically entering every single transaction you

make, you download them straight from the bank, which saves you a lot of time.

6.13   Connect QuickBooks with PayPal using Sync with PayPal app

The Sync with PayPal is free app automatically imports your PayPal sales transactions,

fees, taxes, and discounts into QuickBooks. However, you need to be careful with it; it

had a lot of problem with duplicate transactions. [Read more](#)

7.   Conclusions

My recommendation for Hope Scarves to its influence in the community, around the world, and

improve upon its efficiency. Let the community know who Hope Scarves is and that they need

to spread the word; I suggest selling merchandise such as T-shirts, cups, hats, etc in order to

generate the income needed for improvements. Put more effort into advertising on social

media, search engines, and YouTube. Since they are moving to a bigger place, they will have

more volunteers but the equipment shortage (laptops) is not likely to change. I suggest to Hope

Scarves changes the policy to bring your own devices (BYOD). Software integration is a must for

accuracy, and saving time. Connect QuickBooks with PayPal (Sync with PayPal) and the bank

then you connect Salesforce with QuickBooks. Build or rebuild the database for the scarf by

adding story, color, size and type of cancer to make it easier to fulfill requests. Use one of the

suggested apps for scanning and management of barcodes; I recommend Fuzzy Scan because of

its simplicity. Be sure that when processing orders in the warehouse, there is an organized

assembly line of sorts where each person is delegated responsibilities. Stations may include: (1)

A computer to look up each order, along with what should be included in the package and

where it is going. (2) Barcode labels. (3) Organizations of various scarves, the used scarves

(order by type of cancer) and the new scarves (order by the size) (4) the packaging station. (5)

The scale and postage machine look at [Figure 1](#). Utilize Google Drive to upload photos of the

Scarves to correspond with the exact package identification and name of the client it is for. Staff

will be able to access the photos from a laptop and Smart Phone, and it will be easy to use and

send the photo. Last, Finally, , the UPS simple pickup service is probably Hope Scarves' best option for shipping in terms of price and providing great service to clients. Look at [Figure 2](#) for the price and Executive Summary for the saving.

8.   Appendices

8.1   Basis of Analysis

Hope Scarves is striving to become nonprofit organization with a great technology presence and give hope to more people around the world. How can this be achieved? In order to increase their influence in the community they need to increase their ability to communicate to their target audience.

8.2   Technology Inventory

The current technology inventory, for the Hope Scarves, is good. The organization needs to become a large influence in the community and more efficiency. In order to influence the community they need more laptops, fix the search engine, and advertising. For Hope Scarves to become efficiency they should to connect the Salesforce to QuickBooks and QuickBooks to the bank and PayPal. Rebuild the database for the scarf process. Use smart phone to scan the barcode.

8.3   Top 10 Technology Issues

1) **Manual code enters:** Hope Scarves volunteers enter the scarf code manually which it increases human error, time consuming and misinterpretation. Some volunteers may have had little to no training before doing data entry. This isn't to say that basic Data Entry is difficult and requires expertise, but novice users

with little direction is prone to serious error.

2) **Online search engine**: Hope scarves used to be one of the first pop up in the search engine but now with a lot of organization have the same mission and they are lower on the list of the results. The only ways for Hope Scarves to appear higher on the list is either: pay search engines, or go viral. The former options requires too much money, Hope Scarves cannot pay Google to stay high on the list. Going viral is not a matter of will; Hope Scarves must expand and get its name out there to gain notoriety.

3) **Uploading pictures for gift packages**: Hope scarves sends photo of the scarf to anyone requesting a gift package. The photo of the scarf is taken by phone; it is transferred to a computer and sent to requesters via email. Sending pictures to and from people by phone may be alright for your friends, but the organization may want to improve this process including: higher quality photographs, a way to access them from an official website.

4) **Track inventory:** Hope Scarves does not have a strict inventory recording process. This is to say that there are some things in their inventory, that not everyone is aware exists. The exact number of items they have, color, etc could also be more organized. With a limited number of workers and orders that are personalized, it is imported to be organized; know what you have, where it is.

5) **Financial recorded:** The bank is responsible for telling Hope Scarves' its debt, and they work through their finances with the use of salesforce. It is not clear if the organization has anyone with financial or accounting knowledge working, or

if they are just doing their best and taking it step by step. The point is, any organization that has to spend money could benefit from financial expertise. Especially if they have such a limited budget.

6) **Need of laptops:** Hope Scarves cannot provide new laptops to accommodate all volunteers, and they laptops they currently possess are not exactly top of the line.

7) **Review postage, shipping technology:** Hope Scarves not only pays a lot of money for shipping ($3 a package), they use the United States Postal Service which is: inefficient, erroneous, and expensive. The can elect to use a better shipping service and pursue cost vs. efficiency with those options such as UPS or Fed EX. The challenge here for Hope Scarves is contracting a good shipping service with limited income.

1) **Scarf fulfillment process:** In terms of receiving orders, processing orders, preparing packages, shipping, etc...Hope Scarves has its issues. Part of it has to do with the fact that volunteers are only there for limited hours during the week. Organization could be another issue. Lack of Scarves. Lack of money to buy Scarves, as donations are not enough. Finally, volunteers are likely inexperienced with the responsibilities they have been given, and are learning as they work with little direction. If some or all of these statements are correct, there is no way an organization could run efficiently.

8.4   Strategic Planning/Visioning Documents

[If Available.]

8.5 IT Budget/Spending Documents

The UPS will come to Hope Scarves and pickup the packages with flat rate $11.50 per week. Smart pickup available from Monday through Friday. Smart pickup will save you a lot of money. UPS Smart pickup, it will cost you ($11.50*52.1429 weeks a year= $600 a year) which $600 in two years since the first year is free. Right now, you are paying $3 per package and on average; you ship 35-40 packages per week. ($3*35 packages=$90) per week. Per month it will be ($90*4= $360) per year it will be ($360*12=$4320) $4320 is a lot of money. UPS smart pickup you will save $3720 a year. However, you will save $4320 in the first year.

Cite

https://www.workato.com/integrations/salesforce
http://www.mydbsync.com/product/accounting-quickbooks-and-quickbooks-online-edition
https://www.ups.com/content/us/en/shipping/time/service/value_added/smart_pickup.html
https://appexchange.salesforce.com/listingDetail?listingId=a0N30000009xIEOEA2
https://www.visione.com/premium/
https://apps.intuit.com/syncwpaypal?locale=en-US
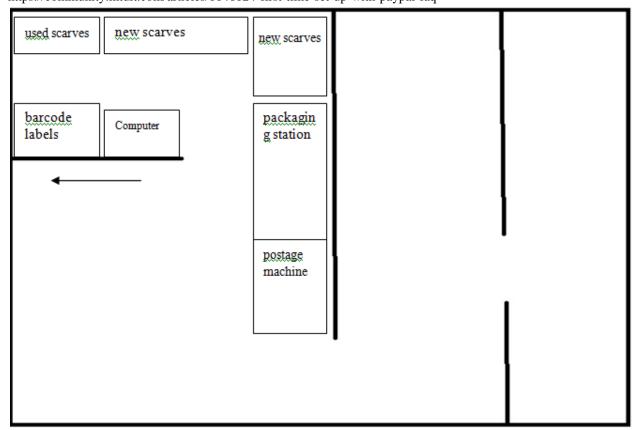https://community.intuit.com/articles/1146124-first-time-set-up-with-paypal-faq

Figure 1

Daily Pickup

Weekly Billing Total	Fee
$0.00 - $74.99	$25.00
$75.00 or more	$12.50

Daily On-Route Pickup

Weekly Billing Total	Fee
$0.00 - $74.99	$23.00
$75.00 or more	$11.50

UPS Smart Pickup®

Weekly Billing Total	Fee
Flat charge per week	$11.50

Day-Specific Pickup

Weekly Billing Total	1-2 Days	3 Days	4 Days
$0.00 - $74.99	$11.50	$16.65	$23.00
$75.00 or more	$11.50	$11.50	$11.50

☒Close Window
☒CB

Figure 2