Online, on-premise or privately built: the right CRM for one nonprofit

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ABSTRACT

Contact management in today's business world is handled through the use of a database. Often, these databases are referred to as customer relationship management systems, or CRMs. There are different types of CRMs, and nonprofit organizations need to consider all aspects of potential customer relationship management systems before deciding upon one. This paper takes the needs of one nonprofit for a CRM and demonstrates the decision making process in choosing the correct CRM for that organization, called Northwest Side Housing Center. In considering a business's needs in a CRM, one must consider the different types of systems offered both on the market and by private contractors, and requirements and suggestions from the ever changing landscape of privacy laws and compliance regulations.

CHAPTER ONE: THE ISSUES

1.1 INTRODUCTION

Organizations around the world struggle with how to affectively organize data. One of the greatest struggles organizations face is how to store contact data. Contact data is an important aspect to a nonprofit's survival. No organization is more tied to its contact list than a nonprofit organization. Nonprofit organizations depend on their contact list to stay in touch with clients, supporters and donors. Without a well-organized contact list, nonprofit organizations cannot effectively achieve their goals.

Today, nonprofit organizations are facing tough economic conditions. Staying focused and in the spotlight with its supporters and surrounding community requires time an attention. In the last decade, social networking, blogging, and email have become additional tools for reaching potential donors. These additional means of staying connected to its potential clients, supporters, donors and community have helped to make the nonprofit organization's contact data more important than ever. How and where the data is stored and accessed are important facets of contact management.

Management of contact data is not simply how to store names, addresses, phone numbers and email addresses of active, inactive and potential clients. Contact management entails the storage, privacy protection, and compliance with governmental regulations. Simply storing data is not enough in today's technological landscape.   As privacy concerns increase and compliance regulations change, an organization needs to focus on a broader scale than simply if the CRM software fits the wants and needs of the organization.

In today's electronic age, privacy issues are rising. Many people pass their private data to companies by choice via several different methods, but they are unaware of what those companies do with their personal data later. Privacy concerns in the Internet Age have become an item of debate. As the Internet becomes more open and available, it is especially important for nonprofit organizations to guard against bad contact data handling. Having a privacy policy in place and available is becoming more and more necessary. Changes in privacy laws are happening more and more often, and staying up to date on the present law is very important.

Privacy laws are not the only aspect of the law that nonprofits need to watch diligently. A nonprofit organization is required to be compliant in the same manner as retail and large corporations when it comes to credit card data storage. Unlike large and retail organizations, many nonprofits do not have the financial backing that allows for expensive networks to protect the credit card data. Nonprofits have smaller budgets, but are held as responsible when it comes to PCI compliance.

PCI compliance is not the only compliance regulation that faces nonprofits. All organizations face compliance requirements when it comes to email and data retention policies. These compliance requirements affect an organization's method of storing contact data, emails and other electronic data. This compliance regulation is called the Sarbanes-Oxley Act, which is often referred to as SOX. Choosing a contact management solution in today's electronic age is more than simply determining what software applications are out on the market, and testing to see what best fits your organization's system and needs. It is a detailed process which requires the consideration of online, on-premise, or privately built systems that not only meet your organization's wants and needs, but something that will assist in protecting client’s private data, how the system works within your compliance regulations and standards, as well as allowing the most effective marketing and client tracking.

1.2 PURPOSE AND SCOPE

Established in 2003, Northwest Side Housing Center (NWSHC) is a nonprofit organization based in Chicago. NWSHC assists its clients in finding adequate, affordable housing and helps in renegotiating mortgages and working through and avoiding foreclosure processes (Northwest side housing center, n.d.). According to my NWSHC contact, NWSHC overhauled their network last year, replacing end user desktops with Windows 7 machines, updated the office suite to Microsoft Office 2010, and installed a Microsoft SBS 2011. Exchange is built into the Small Business Server and the email utilizes Outlook from the Office Professional 2010 suite. Per the technician at NWSHC, the system has a “HP P212 RAID controller with a 256MB cache and a write-back cache battery backup configured RAID 5 with three 250GB hard drives and one hot spare” (See ADDITIONAL RESOURCES at the end of this document, email dated January 21, 2011). This system is what will host the CRM solution for NWSHC. In addition, my contact at NWSHC stated that the budget for the solution chosen is $500.00. This amount, although preferred to be a one-time expense, other considerations may be made if the solution is particularly effective.

CHAPTER TWO: CRM SOLUTIONS

Today, contact database systems are often referred to as customer relationship management systems, or CRMs. CRMs can be online, on-premise or blended solutions. An online solution stores the data in the cloud, and can be accessed from any computer that is connected to the internet. There are many online, or web based solutions offered including SalesForce, Constant Contact and Microsoft Dynamics CRM Online.

2.1 ONLINE CRM SOLUTIONS

An online customer relationship management system offers the flexibility of accessing the contact list from anywhere there is an Internet connection. If a worker needs to work from home, access is available through the Internet. The responsibility of backing up the data would be moved from the IT staff at the nonprofit organization, and placed in the hands of the online solution's workers. The pros and cons of online CRM systems as written by Cliff are seen below in Table 1.

Table 1 – Pros and Cons to online solutions (Cliff, 2010)

Pros of SaaS CRM	**Cons of SaaS/Online CRM**
1. No long rollout time-frame. The implementation is almost immediate – because typically the vendor configures and maintains the servers.	1. You are normally locked into a monthly service contract.
2. No server (hardware) purchase or maintenance (staffing) is required. Neither is server software licensing required.	2. In some instances, you are limited to a specific number of users.
3. No software installation is required. There are two key exceptions: (1) a plug-in for integration with Microsoft Outlook (2) offline access via a synchronization database on the local machine.	3. Database size is limited at times

4. No software or server upgrade is required. Upgrades and improvements are typically automatically pushed out. This can normally be easily monitored and managed by the administrator.	4. Storage Size can be limited at times (with substantial price increases for extra storage requirements)
	5. Custom Entities can be limited at times (although 200 entities is probably more than enough)
	6. Custom Workflows can be limited (although 200 workflows is likely more than enough)
	7. Some systems charge more when users reside outside the US or Canada
	8. Some CRM solutions supported only the English language – and charge more for others

One of the best aspects of online solutions is the fact that there is little to no time between acquiring the software solution and rolling the solution out to users. If any time is needed between the two, it would be the time spent customizing the software to meet the needs of the company's method of storing contact data. In addition to the almost instantaneous roll out of the software, Cliff lists the lack of expense of needing a server to support and host the software as a plus. This lack of expense should be factored into the TCO when comparing online and on-premise solutions.

2.2 ON-PREMISE CRM SOLUTIONS

If an online solution is not desired, on-premise solutions are a viable option. On-premise solutions are installed on servers that are maintained onsite, and unlike online solutions that bill monthly, on-premise solutions bill either per Client Access License (CAL), or by user or groups of users, which normally require a yearly renewal. Popular on-premise solutions include Microsoft Dynamics CRM, ACT by

Sage, and Microsoft Dynamic CRM - On-premise CRM 4.0. In the article entitled "On-premise CRM pros and cons", a small focused list of the good and bad aspects of on-premise solutions is given. This list can be seen below in Table 2.

Table 2 –Pros and Cons to on-premise solutions (On-premise CRM pros and cons, n.d.)

The "Pros"	**The "Cons"**
More flexibility. On-premise CRM applications provide deeper customization capabilities, so companies can tailor the features, interfaces, and other characteristics of their solution to best support their specific needs and unique customer-facing processes.	Higher upfront costs. Unlike hosted software, which is "rented" for a reasonable monthly fee, on-premise CRM packages come with large price tags. Software must be licensed, and the needed hardware to support its operation must be purchased.
Greater control. When a business selects an on-demand software solution, it is handing a certain amount of control over the software and its associated hardware to the third-party service provider. With on-premise CRM, all components are housed and overseen by the customer. Many companies prefer this approach, because they can ensure – first hand – optimum performance, reliability, and availability of the system at all times.	Slower return on investment (ROI). Because they cost more at the outset, it takes longer for companies who choose an on-premise CRM solution to recoup their initial investment.
Tighter security. Customer data is sensitive and highly confidential. That's why some organizations simply don't feel comfortable with the on-demand approach, since it requires the servers that contain client information to be managed by the vendor. With on-premise CRM, companies can rest assured that the appropriate protection mechanisms are in place, so their customer data doesn't fall into the wrong hands.	Increased maintenance. The primary benefit of an on-demand CRM solution is the fact that ongoing maintenance and administration tasks are taken care of by the service provider. With on-premise CRM, staff resources must be dedicated to ongoing system monitoring, as well as all routine service, upgrades, and enhancements. This can be an issue for smaller companies who have limited technical resources.

Lower total cost of ownership (TCO). Although on-demand solutions are cheaper in the beginning, after the first several years, the costs can really add up. In fact, many experts believe that after a period of five years or more, the use of a hosted software package is no longer economical. While on-premise CRM applications are more expensive initially, they end up costing much, much less over their lifetime.	

Although on-premise CRM solutions cost more upfront, according to On-premise CRM pros and cons, the TCO over the lifetime of the software is cheaper. This fact can play a very important role for organizations with small budgets. Other deciding factors over the online software solutions can include the greater flexibility and greater control also mentioned above in the On-premise CRM pros and cons article.

2.3 BLENDED SOLUTIONS

If an organization needs the greater control offered by on-premise solutions, but likes the flexibility that Software as a Service (SaaS) offers, then serious consideration should be placed into looking at the new CRM software offerings that are showing up in the recent market. These new CRM solutions offer a blended software application that is installed on servers hosted on your network, but offer web based access to the data as well. These new blended software solutions are offered by ACT by Sage and Microsoft Dynamics CRM. Blended solutions offer the ability for users to access the software both on-premise, and online. Many CRM solutions today are offering this feature, and some even have mobile device access to the database.

Blended features offer the flexibility for users to access the database via a laptop when traveling or working from home, and even from a mobile device when working in the field. This flexibility allows work to continue beyond answering emails to include the updating of notes on client communication details, and other features as well depending on the personalization and features used by the business.

2.4 PRIVATELY BUILT SOLUTIONS

Another option that NWSHC and other organizations have is the option to employ a private party to develop a solution for them. If a private party is hired to program a solution, the price would be negotiable based on the going rates for programmers. Although there are several tools, applications and languages that can be used to code a solution of this sort, the most likely candidates would be a SQL or Microsoft SQL database with a PHP or ASP.net user-friendly interface. Going rates for SQL coders vary, but PayScale.com rates the hourly pay for SQL programmers at between $18.21 - $53.27 an hour (PayScale - SQL skill wages, hourly wage rate, n.d.). Additional costs would be incurred for the PHP or ASP.net portion of the program. A perk to choosing a privately built platform is that the solution would be built specifically to the organization's specifications and needs. The level of security would be based on the nonprofit's needs and desires, and if the desire for encrypted records or emails, that option could be built in as well.

As with any solution, choosing to go the route of the private solution does have its challenges. Challenges can include choosing a programmer, and having their background check come back unacceptable. It is assumed that the nonprofit organization would run background checks, due to the importance for nonprofit organizations to have due diligence in using background checks for its employees and those working for the organization. Background checks are important because nonprofits often work with the most at risk in the community (Are nonprofit organizations subjected to the same privacy laws regarding background checks?, n.d.). This potential downfall adds expense to the project, as would any long-term maintenance that could potentially be needed if not negotiated in the initial price. There can be numerous reasons for extra expenses¸ and this should be carefully considered when choosing this option.

CHAPTER THREE: COMPLIANCE STANDARDS

When considering software products, different organizations need to focus on different compliance standards. NWSHC needs to meet both Sarbanes-Oxley (SOX) and Payment Card Industry (PCI) standards to be compliant. Government compliance is in place to protect both companies and individuals. Each standard protects a difference area of interest. Sarbanes-Oxley protects electronic files from being destroyed, and PCI is in place to protect credit card data.

3.1 SARBANES-OXLEY ACT OF 2002

Sarbanes-Oxley, better known as SOX, was brought about due to ethical issues in corporate America. Linda Volonino and Stephen Robinson state in Principles and Practice of Information Security: Protecting Computers from Hackers and Lawyers that Sarbanes-Oxley constitutes the police force behind the ethical requirements put into place in 2002 (Volonino, L., & Robinson, S. R. 2004). Sarbanes-Oxley has become part of the technological burden of nonprofit organizations because of the ethical ramifications that will affect an organization if financial mishandling or cover-ups are found.

If a nonprofit organization mishandles its finances, and the event becomes public, that nonprofit organization will lose the trust of the community with which it works. Losing the trust of the donor base can mean the end of a nonprofit organization as well as the client base which it serves. Small nonprofit organizations are bound by the funds that it is able to gather, and any sizable loss can mean the end of the organization. An organization, corporate or nonprofit must, according to Shon Harris must protect electronic data and guarantee the integrity of that data for all documents, including emails, which contain financial data or information (Harris, S. 2010). If a company or organization is not compliant with the Public Company Accounting Reform and Investor Protection Act of 2002, also known as the

Sarbanes-Oxley Act, then that company or organization faces stiff and heavy fines as well as potential jail time (Harris, S. 2010).

Compliance with Sarbanes-Oxley means that organizations are required to properly protect data as well as verify the integrity of the data, when it is financial in nature. For nonprofit organizations, whose ranks are usually comprised of volunteers rather than full time, paid employees, compliance with SOX can be even more important. Additionally, with the publication of Form 990, and Form 990-PF to the internet, it has become more important that nonprofit organizations stay on the up and up with their financial holdings.

Form 990 and Form 990-PF are financial documents that nonprofit organizations are required to submit to the IRS. These forms are published on the Internet by third party organizations (The Sarbanes-Oxley Act and Implications for Nonprofit Organizations n.d.). These forms can include salary information for paid employees, donor information including amounts donated, and other financial records pertaining to the nonprofit organization's yearly expenses and grants (Help desk: An introduction to the Form 990PF n.d.). Access to this information gives potential donors the ability to determine for themselves the strengths and potential weaknesses of a nonprofit organization. Each of the lines of data that are contained in the Form 990 or Form 990-PF, are items that came from information protected by the Sarbanes-Oxley Act. Private donors to the nonprofit organization are listed in the Contributions section, but if the private donor used a credit card for donation purposes, SOX would not be the only regulation that would protect their personal data.

3.2 PAYMENT CARD INDUSTRY STANDARDS

Payment Card Industry (PCI) standards were initially suggested by Master Card, and accepted by Discover, American Express and Visa in 2004 (The basics of PCI compliance and validation regulations n.d.). Each of the four major credit card companies agreed to the standards which protect credit card holder's private data. PCI Security Standards Council maintains records of compliance and oversees the implementation of the standard.

The PCI standard effects all organizations that deal with credit cards. For nonprofits, credit card transactions are at the heart of the fundraising focus. Credit card donations can be accepted at fundraising events, via the organization's web site, mailings or even through Facebook. In gathering this credit card data, organizations make themselves targets for hackers, who want to obtain the credit card data. If an organization's security can be breached, a hacker can potentially get to the credit card data, which can be used or sold to thieves.

Nonprofit organizations rely upon its donor base to stay open and fulfill its goals. If a nonprofit's network falls to hackers, and credit cards are exposed, then the trust that donors have with the nonprofit is lost, and the organizations is likely to loose donors. Loss of donors will directly affect the bottom line of the nonprofit, and the organizations will become less effective in the community. Therefore, PCI compliance is an important aspect to a nonprofit organization's network.

PCI compliance is an international standard, affecting all organizations that have credit card users located in the United States. As well, nonprofit organizations around the world that accept credit card donations from United States citizens are required to be PCI compliant as well. PCI compliance requires organizations to protect the credit card numbers and personal data of credit card users. According to PCI Standard Security Council's web article entitled "How to be compliant: Getting started with PCI Data Security Standard compliance", an organization can begin to become compliant through the following basic steps:

1. The organization needs to audit the equipment and processed used to access the credit card holder data, once the cardholder data has been identified. The audit should review how the data is accessed, the procedures to access the data, and the equipment that stores the data for any and all vulnerabilities.
2. The organization need to take the information gathered in step one, and take action to correct the vulnerabilities found in the audit, as well as determining if the storage of the cardholder details and information is indeed a necessary evil.
3. The organization should then gather all documents and reports required in relaying all corrective actions that were taken, and submit the appropriate reports to the banks and agencies that need and or require the compliance reports ("How to be compliant: Getting started on PCI Data Security Standard compliance" n.d.).

These basic steps are not going to guarantee any organization compliance with PCI regulations, but are a simple starting point for obtaining compliance.

Simply achieving compliance should not be the goal of any organization required to be PCI compliant. Staying compliant through routine checks and audits will not only ensure compliance, but will over time build consumer, and in the case of nonprofit organizations, donor trust. Staying compliant, according to Alexander Howard, is as challenging for nonprofit organizations as it is for other commercial organizations due to the continual changes in the standard and how those changes can be interpreted

(Howard, A. 2009). The continual changes and the different ways that the changes can be interpreted place a large burden on nonprofits, more so than commercial industries because the budgets of small nonprofit organizations is less.

CHAPTER FOUR: PRIVACY LAWS

Compliance is not the only issue facing organizations in today's technology based society. According to a study performed by Javelin Strategy & Research, statistics show that in 2011, identity theft fell twenty-eight percent (Identity fraud fell 28 percent in 2010 according to new Javelin Strategy & Research report. 2011). Although the percentage makes it appear that the numbers are going down at a good pace, the reports also states that the 8.1 million United States citizens who dealt with identity theft paid more to resolve the situation than in years past (Identity fraud fell 28 percent in 2010 according to new Javelin Strategy & Research report. 2011). Identity thieves do not focus only on credit card users anymore, they seek the Social Security numbers of private citizens as well. Due to identity theft, individuals are becoming more cautious when passing out personal, private data. Due to media coverage, privacy rights are being brought to the forefront in the knowledge of consumers.

4.1 PRIVACY AROUND THE WORLD AND IN THE STATES

Nonprofit organizations, which rely upon the generosity of consumers to fund their missions, need to consider carefully the protection it provides for its donors and clients. Credit card protection is not the only type of protection that is needed. More and more, personal private data including workplace information, address and email addresses need to be protected. According to David E. Ross, in his editorial entitled "Privacy Laws", the European Union has laws that prevent businesses from profiting from customer and employee private information. Those United States businesses that choose to operate in the EU markets must adhere to those laws (Ross n.d.). Ross suggests that US companies and the government profit from the exchange of this exact data. "Even our own government has branded those laws as unfair" (Ross n.d.). Even thought the laws may seem unfair to some businesses within the

United States, other influential businesses push for the overhaul of present day privacy laws. Glen Chapman states in his article entitled Coalition wants US privacy law revamped for Internet Age, that influential businesses that work within the technological and telecommunication realms feel that the Electronics Communications Privacy Act (ECPA) of 1986 is no longer relevant in today's society. The article goes on to state that the Center for Democracy and Technology (CDT) would like to see that personal data that is stored online receive the same privacy protection that items within a home have now (Chapman 2010). Presently, states Chapman, "The law currently eliminates need for warrants in cases of messages left in Web-based email accounts for more than 180 days, according to Dempsey" (Chapman 2010). This lack of privacy to all persons and organizations has caused an uprising in the number of legal cases based on privacy issues.

More and more, privacy issues are being taken to the courts for rulings over who, what and how personal data should be protected. Nonprofit organizations are often involved in these cases for various reasons. Two such cases, both involving nonprofit organizations show that even then, the path can be unclear. In a case involving Minnesota Public Radio (MPR) and the Minnesota Attorney General, the case focused on the fact that Minnesota Public Radio did not disclose properly how it used donor information (Faegre & Benson LLP n.d.). The case was settled out of court and nonprofit organizations that work in Minnesota should abide by the guidelines listed below.

- The organization must disclose clearly that it releases private data of its donors to other organizations.
- The organization must clearly state what data it releases.
- The organization must clearly define how often it releases the information.
- The organization must disclose the reasons behind the release of information.

- How the third party might use the information gained from the organization.
- The organization must clearly define the steps a donor must take in order to prevent his or her private data from being release to third parties (Faegre & Benson LLP n.d.).

This list of recommended actions that are suggested for nonprofit organizations should not be shunned by organizations working outside Minnesota only. Other states including Massachusetts have laws concerning the privacy of personal data (201 CMR 17.00 standards for the protection of personal information of residents of the commonwealth, n.d.). The actions listed in the Minnesota case as well as the laws of other states should be scrutinized by all organizations as something to consider in the fast changing landscape where we now exist. Implementing notifications for donors similar to these protect not only the donor, but the nonprofit as well, since it notifies potential donors of how their data will be treated. If an organization does not exchange data with third parties, then consider stating that clearly as well. Actions such as these, when not warranted or required by law can build trust within one's constituents.

4.2 A DONOR'S BILL OF RIGHTS

A strong level of trust with potential clients within the community is needed for nonprofit organizations. When an organization fights to keep its data private for unethical reasons trust is once again broken. Disclosure and non-disclosure of donor data should be carefully considered be each and every organization. When a headline like "Judge strikes down nonprofit's bid to keep donors private" is printed, those that seek to remain as anonymous donors shudder. Not every nonprofit organization should have private donor data, according to a Chicago federal judge (Sachdev, 2010). According to the article written by Ameet Sachdev, the Center for Individual Freedom, a nonprofit organization located outside Illinois, attempted to challenge Illinois state election laws. The election law that the group was focused on, was one that requires the public listing of campaign expenditures and donations (Sachdev, 2010). The group wanted to achieve anonymity for its own donors, so that when it fed donor dollars into the election, those donors would be kept private. In this instance, the group had a history of feeding large amounts of money into political campaigns in an attempt to sway the outcome (Sachdev, 2010). Confusion created by rulings and settlements that differ in outcomes such as the two demonstrated here can lead to frustration on the part of IT workers, and may cause the wrong action to be taken, or the proper action to be overlooked.

When met with conflicting directions as in the two different outcomes from the separated cases listed above, nonprofit organizations need to determine what is best for their organization. Using some common sense, certain protective items should not be ignored, but put in to practice on a daily basis. For instance, the Donor's Bill of Rights was created by several different groups, and lists ten important rights that all nonprofit organizations should grant to its donors (Donor bill of rights, n.d.). The list of rights appears below.

> I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
>
> II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
>
> III. To have access to the organization's most recent financial statements.
>
> IV. To be assured their gifts will be used for the purposes for which they were given.
>
> V. To receive appropriate acknowledgement and recognition.
>
> VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.

VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers (Donor bill of rights n.d.).

The Donor Bill of Rights is not the only guideline that nonprofit organizations should consider placing on their website. Nonprofit organizations who operate or reside in Illinois should also consider placing information or a link to information on the Personal Information Protection Act that was passed in Illinois in 2005 (Illinois passes privacy act, 2005). According to the Personal Information Protection Act, Illinois defines personal information as “an individual’s first name or first initial and last name in combination with any one or more of the following data elements, when either the name or the data elements are not encrypted or redacted:

(1) Social Security number.

(2) Driver’s license number or State identification card number

(3) Account number or credit or debit card number, or an account number or credit card number in combination with any required security code, access code, or password that would permit access to an individual’s financial account.

“Personal information” does not include publicly available information that is lawfully made available to the general public from federal, State, or local government records. (Source: P.A. 94-36, eff. 1-1-06.)” (815 ILCS 530/ Personal Information Protection Act, n.d.). The Illinois act requires all company and organizations to notify Illinois residents of a security breach, no matter the location of the company or organization (Illinois passes privacy act, 2005). This gives Illinois residents a better sense of security, but places additional requirements on companies and organizations in the event of a security breach. Only those whose data had potentially been breached should be notified, but since organizations would not know which contacts the hacker had seen, they would need to notify all contacts involved in the event.

4.3 PRIVACY AND POSTAL MAILING LISTS

Businesses, especially nonprofit organizations do not rely upon email communications alone with its clients. Clients who rely upon postal mailings may not be as large as the electronic mail group, but postal mailings can be an added way to keep the business and its goals in focus with clients, potential clients and other businesses. Tracking those who rely upon postal mailings only and the addresses of both other businesses and clients with email addresses can be as important as tracking avid email users.

The method of tracking those users who prefer postal mailings to email mailings is no different when using a CRM. Privacy concerns exist with postal mailing lists just as they do with electronic mail lists. A proposed bill in Illinois, which never made it through to legislation attempted to make it illegal to use donor lists as a method for gaining donors or potential profit (Nonprofit organizations and privacy: responsible mailing list management, 1995, June 15). The potential fall out from a bill similar to this being passed would be huge for businesses. The Privacy Rights Clearinghouse has a checklist that nonprofit organizations can look to concerning its actions regarding postal mailing lists (Nonprofit organizations and privacy: responsible mailing list management, 1995, June 15). The list includes questions that a nonprofit can answer about its own actions with other's mailing lists that it acquires as well as what it does to protect its own donors and mailing list members. The checklist includes asking telemarketing companies hired to do telephone solicitations using the business's contact list if the telemarketing company then sells that list to others. It is unknown actions like these that can threaten the reputation of an unsuspecting nonprofit.

4.4 PRIVACY AND SOCIAL MEDIA

Another area that businesses and nonprofit organizations need to consider when looking at privacy laws is the social media sites and blogs. A 2008 study shows that nearly 90% of the top 200 charitable organizations used some method of social media (Barnes, N., & Mattson, E., n.d.). Social media includes things like social networking, video blogging, micro blogging, wikis, pod casts, message boards and blogs. A more recent study shows that every one of the top 200 charitable organizations uses some form of social media (Barnes, N., n.d.). The results of these two studies demonstrate the importance of social media to nonprofit organizations today. When nonprofit organizations use social media, they need to be very careful about contact data that is released during the use of these media outlets. Protecting the personal data of client and contacts is no less important when using social media. Nonprofit organizations should acquire permission to use the personal data of the client or contact before making that data public. There are real consequences to not gaining permission to post the personal data on social media sites. Some of those unplanned consequences are listed below.

- Members may be contacted by other organizations that want them to join, possibly resulting in membership migration.

- If your is a civic organization involved in legislative issues or setting public policy, politicians looking for financial support or endorsements may contact those you list on your site.
- Some members may have personal safety considerations such as stalking or domestic violence in which they must keep their location a secret.
- Addresses, phone numbers, and e-mail addresses of members might be accessed to pitch commercial products and services.
- Those who disagree with your organization's perspective may harass those whose personal information is posted online.
- Some members, though supportive of our efforts and active in the organization, may not want to be publicly-affiliated with the positions espoused by the organization.
- Members may have an unlisted or unpublished phone number that they want to keep private.
- Posting personal e-mail addresses could cause individuals to receive unwanted e-mail solicitations and spam. If individuals' names are listed in the white pages of the phone book, just posting their name on your web site may enable others to access additional personal information.
- Noting the names and other personal information about donors can lead to unwanted requests for other charitable donations.
- Posting pictures of minors could lure online predators (Online privacy for nonprofits, n.d.).

Releasing the personal data of contacts can cause many unintentional consequences that reach far beyond what businesses plan for their social media sites. Businesses and nonprofit organizations need to consider any an all potential outcomes when releasing any and all personal data.

CHAPTER FIVE: PROPOSAL TO NWSHC

A proposal is being prepared and will be presented to Northwest Side Housing Center on May 16, 2011. The proposal does not evaluate privately built software solutions. It does evaluate two online software solutions, and two on-premise solutions. A best choice is determined from each based on ease of use, and several other criteria listed in the software comparison tables. After the online and on-premise solutions were evaluated separately, the top contender from each area was compared against the other, and a final decision was made. This decision is the recommendation that will be placed before NWSHC as a best choice, but one that will not be weighed against a privately built solution. A rough draft of the proposal is included in the following pages.

NEW CRM SOFTWARE

A PROPOSAL TO: NWSHC

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THE RIGHT CRM SOLUTION: A SEARCH

COMPANY DESCRIPTION

Northwest Side Housing Center (NWSHC) is a nonprofit organization that operates on the Northwest side of Chicago. NWSHC provides the area residents and potential residents with assistance in locating safe and affordable housing. Opened in 2003, NWSHC has several programs that are ongoing that include assisting those looking for rooms or apartments to let, and assisting homeowners who are at risk of loosing their homes to foreclosure.   NWSHC has improved the lives of the area residents through its programs and efforts in the last eight years, and is continuing to improve resident's lives through expanding efforts and programs.

DESCRIPTION OF ISSUE

Northwest Side Housing Center in 2010, updated their computer network. Updates to their network include all new workstations equipped with Windows 7 OS and Microsoft Office 2010 Professional. In addition to new workstations, NWSHC has purchased a new Microsoft Small Business server. These new upgrades will aid NWSHC in reaching out to its clientele in the Northwest Side area of Chicago. The one aspect of their upgrade that has not been researched is the contact data management system. Presently, there are several people who maintain spreadsheets of contact data. These spreadsheets of data are not regulated, nor are the contents kept using a single method. Each creator of a spreadsheet maintains the spreadsheet in a manner that they as an individual appropriate, so there is no consistency from one spreadsheet to another. This inconsistency is not conductive to efficiency in work, and can cause an increase in work hours when marketing materials need to be sent out or telemarketing needs to be conducted. NWSHC feels that if a new customer relationship management solution was implemented, then overall the marketing mailings and telemarketing efforts would be reduced resulting in increased performance and potentially better overall results.

THE RIGHT CRM FOR NWSHC

RESEARCH

There are three software options to choose from when considering different CRM solutions. The first of the three types of software is an online solution. Online solutions offer the flexibility of access from any location that has an Internet connection. This option would give NWSHC employees and volunteers the ability to work from any location of their choosing, if necessary. One downside to online software solutions is the inability in many applications to manipulate the software to fully meet the needs of the company. Another downside is the need to store the contacts off-premise, thus requiring a trust in another network that the company has no direct control in policies and procedures.

The second type of software is an on-premise solution that would be installed on company servers and managed by company IT personnel. This type of software often requires more initial time to set-up and prepare for end users to use, but over time has been found to have a lower TCO. On-premise software does initially require a larger investment from the start, but has been found that over time, the cost is lower. Additionally, this type of software can be more easily adjusted to fit the company's needs, and if those needs change, re–adjusted.

The third type of software application would be one that would be designed specifically with the company's needs in mind. This type of software can be more expensive due to the cost of the programmer. The costs for SQL programmers are around $18.21 - $53.27 per hour, according to PayScale.com. Additional costs can be incurred if your SQL programmer does not include a user friendly GUI, but charges extra for this feature, but the only cost incurred would be that of having the program coded, and potentially updated when desired. This could be the software with the longest wait time before use, depending upon the length of time required by the programmer to finish the project.

A fourth software option has hit the market in the recent past. This software option is a blended solution of both the on-premise and online software options. This allows the NWSHC employees the option to work from home and from the office and not worry about having the contact data in the hands of another company whose network security could fail. This type of software is often installed on the Web server. This is newer technology and should be carefully considered when looking at the security of the network and contact data.

The following software applications were tested with the needs of NWSHC kept in mind.

Online	On-premise
SalesForce	Act! By Sage Premium 2011
Microsoft Dynamic CRM 4.0	Microsoft Dynamic CRM – On-Premise CRM 4.0

TABLE 1

TESTING RESULTS

Testing was done one application at a time, with a non-biased opinion on what type of solution would benefit Northwest Side Housing Center the most. Obviously, a privately built solution was not tested, as one was not available to test. It is assumed that extensive discussion and planning would be performed before a privately built solution would be coded by a third party.

All tests were performed on a Windows XP machine, as a Windows 7 OS was not available for testing. System requirements were checked and noted before testing began. Items of interest were the ability to personalize the system easily, the ability to import and export data from common file types like csv, and xls, and access management.

The financial requirement of NWSHC was stated to be $500.00 as a one-time cost. This ruled out several online solutions entirely, including Aplicor and SAP Business by Design, which are both priced at $89.00 per month, per user. Most online solutions are based on a monthly cost, per user. The financial requirements placed on the solution would quickly overrun this amount. There are online solutions that are free or lower in cost, but these have limitations that would not fit NWSHC's user or field needs. Rather than abandon online solutions completely, two online solutions listed in "Top 5 on-demand CRM software systems" were chosen to test. Those two solutions were Microsoft Dynamic CRM 4.0 and SalesForce 11. Table 1 below shows the results of the testing of online solutions.

	SalesForce 11	Microsoft Dynamics CRM 4.0
OS capabilities	W7, Vista, XP all 32 bit only	W7, Vista, XP Pro
Browsers	Chrome v 8, Firefox, IE v 6,7,8, Safari v 5	IE v 6,7,8
Access Controls	levels, each level can see below, but not those on same level	levels, each level can see others at that level but not above; privileges for tasks and records can also be granted
Import file extensions	Uses a wizard different that is for individuals and admins, file extensions: csv, txt; for individuals up to 500 contacts per import.	csv, txt, or xml files; also takes zip files where all files are of the same extension, and compatible with what is listed
Pricing	$5.00 per month, per user (contact manager) and up	$34.00 per user, per month promotional pricing until 06-30-2011, then $49.00 per user, per month
Search function	very Google like, searches on whole and partial words	similar to an SQL query, not a Google search
User Friendly rating (1 - 10, 10=very user friendly)	8; creating items like accounts was more difficult than I felt it needed to be	6; set-up for users time consuming, scheduling activities confusing and complicated.
Browser security	cannot back into the application after logging out; can use History to get into without logging into the software IE8, FF.	cannot back into the application or use history to get back into program once signed out, with IE.

TABLE 2

On-premise software solution testing was completed in the same manner. The only difference between the online testing and on-premise testing is there was no need to worry about browser compatibility or security, but a need to verify the Microsoft Office version did arise. Act! by Sage 2011, is a Microsoft Outlook overlay. It uses features of Office to complete email tasks, and can be synchronized with Outlook contacts and calendar items. Microsoft Dynamic CRM - On-premise CRM 4.0, the second on-premise solution tested, was much like the online version only located within Microsoft Outlook. Table 2 below shows the results of the on-premise software solution testing.

	Act! by Sage Premium	Microsoft Dynamic CRM - On-Premise CRM 4.0
OS capabilities	W7, Vista, XP, Windows Server 2003, 2008	W7, Vista, XP Pro
Microsoft Office Versions	2003, 2007, 2010, all 32 bit versions only	2003, 2007, 2010
Access Controls	database can be shared or synchronized, and access levels can be defined by admin	each level can see others at that level but not above; privileges for tasks and records can also be granted
Import file extensions	csv, txt, xml, pst, pad (Act databases)	csv, txt, or xml files; also takes zip files where all files are of the same extension, and compatible with what is listed
Pricing	$459.99 for up to 10 users	$622 - $880 (CAL), $186 - $263 (Limited CAL)
Search function	two types of searches, one is more Google like, and the other is more like a database query	similar to an SQL query, not a "Google" search
User Friendly rating (1 - 10, 10=very user friendly)	7 - It takes a while to get used to how things are done; integrating with Outlook can be difficult to set up, especially with synchronization	6; set-up for users time consuming, scheduling activities confusing and complicated. Same as the online version, just in Outlook.

TABLE 3

The results of the testing show that when choosing an online option for a CRM solution, SalesForce outranks Microsoft Dynamics in both pricing and user friendliness. Neither online option was difficult to download, and there was no installation necessary after the download, only configuration and data importation was needed. Of the two tested extensively, SalesForce was found to be easier to learn and use over Microsoft Dynamics CRM – Online.

On-premise software solution testing was more time consuming, due to issues integrating the software with Outlook. Of the two solutions tested, Act! by Sage was somewhat easier to integrate and populate. Once the user is more familiar with where items are located, the software seemed to run smoother than the Microsoft Dynamics CRM – On-Premise solution. Having both the "Google-like" and query form of searching was a nice feature as well.

The on-premise testing was more difficult due to integration with Outlook in both instances. Although the time to properly configure and populate data within the database took longer, the TCO over time will be less with an on-premise solution rather than an online solution. As for blended solutions, ACT! by Sage Premium has the option that can be purchased separately, to allow the database to be accessed via the Web as well. This would require the database to be installed on the Web server, but would allow greater flexibility for the users. Although Microsoft Dynamics CRM 4.0 allows for the same integration in both Web and on-premise access, the software itself was found to be more difficult to use and less user friendly than ACT! by Sage Premium. It is reasonable to say that any of the four software solutions tested are capable of fulfilling the needs of NWSHC, but ACT! by Sage Premium stands out in pricing, ease of use, and user friendly programming. Therefore, it is my recommendation based on research and testing that Northwest Side Housing Center considers ACT! by Sage Premium for its next CRM solution.

Trina S. McNamara
1617 Dearborn Street, Crest Hill, IL 60403
Phone: 779-435-0061
trinasmcnamara@lewisu.edu

CHAPTER SIX: SUMMARY

Finding the right customer relationship management solution is a difficult undertaking for any business. Nonprofit organizations seeking a CRM, have many more choices today than even just a few years ago. Software solutions include online, on-premise, privately built and even blended solutions that offer both Web access and an on-premise installation. Choosing between these software options are not the only obstacles faced by organizations. Changing privacy laws, PCI and SOX compliance are also items that need to be considered when choosing a CRM. What personal data is released, where it is released, and to whom it is released are all valid concerns in today's changing privacy law landscape. Allowing a client or contact the right to choose if their data is released in any way is without a doubt the best choice. Publicizing your policy on personal data and arming clients and donors with knowledge of their own rights by listing a Donor's Bill of Rights on your web site or social media site can assist in gaining trust of those who use and donate to your services.

Protecting the data of those who donate and use your services by making sure that the organization remains compliant to all relevant governmental regulations is without a doubt a top priority for nonprofit organizations. Nonprofits rely upon the gifts donated to keep the organization financially viable. Keeping strict guard over personal and credit card data and access to the data is possibly the top priority for nonprofit IT Departments. Storing credit card data in the same location as other personal data is a risk that should be carefully considered. How data is stored is as important as how the data is accessed.

Online CRM solutions use a secure HTTP site for client access. Access controls existed on all of the online software solutions that were tested and researched, yet there were glaring security holes in at least one of the solutions. Thoroughly testing online solutions, questioning the company about how they handle your contact data and how that company verifies its security are simple requirements for those considering online CRM solutions. Although the TCO is higher for online solutions, many companies today are using this option. The flexibility it offers the end user, as well as the lack of hardware and maintenance can be a large draw to this option.

The on-premise CRM solution does have a higher start-up cost and takes longer to implement than its online counterpart. On the other hand, it has a lower TCO, and can be more easily customized for the business's needs. Access controls are still the method used to protect data from employees who do not need access to the data, but how the access controls were implemented varied between solutions that were tested. Many of the on-premise solutions offered plug-ins or additional software add-ons that could be purchased at an additional cost that would allow the on-premise solution to have Web access.

These Web accessible, on-premise solutions are the newest items to hit the market. These new solutions are called blended solutions, and would require no less diligent testing for security holes than an online solution. Since both of the on-premise solutions tested for NWSHC offered Web access, no additional solutions were tested. It can be stated that one online solution did fail a security test. It allowed a person back into the software without authentication after logging out successfully, when the person used the browser's history.

Security issues like these could also plague privately built solutions, if a programmer was not aware of these methods of hacking. Security and access controls on a privately built solution are only as strong as the programmer's training and knowledge. Privately built solutions do have a very large advantage over commercially sold solutions, and that is the fact that the program is built specifically for the organization and the needs of that organization. It would be the responsibility of the organization to research the programmer and the security of his programs.

Finding the right CRM for an organization is no small feat. There are many aspects to the research and decision making processes that are well beyond the testing and pricing of CRM solutions. NWSHC is in need of a good, secure CRM solution that will grow with the organization and allow it to increase efficiency when dealing with its clients, donors and community members. After weeks of testing and research, a decision was made and a proposal drawn up suggesting that one on-premise solution that does have Web capabilities at an additional cost would be the best choice based on the organization's needs. That solution will allow NWSHC the flexibility and consistency that is presently lacking, and provide the security needed to ensure NWSHC clients, donors and supporters have nothing to worry about when it comes to personal data.

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ADDITIONAL SOURCES

EMAILS BETWEEN CATHY LAZUKA FROM NWSHC AND MYSELF IN DESCENDING ORDER

from Cathy Lazuka <cathylazuka@gmail.com>		
to	Trina McNamara <mathemomician@gmail.com>	
date	Tue, Mar 22, 2011 at 2:51 PM	hide details Mar 22
subject	Re: question	
mailed-by	gmail.com	
signed-by	gmail.com	

Thanks Trina,

The Northwest Side Housing Center has grown rapidly, particularly since 2007. First, the Center's **budget increased 123%** from 2007 to the projected budget in 2011. This has resulted in the staff team growing from four part-time independent contractors to a professional, salaried staff team of seven and four independent contractors. The growth came from building partnerships with twelve new funding sources. Second, the increased funding, marketing, office efficiency and community visibility created by the first OCB projected enabled us to **assist 1200% more community residents** between 2007 and 2010. This is a significant increase in the number of people participating in housing counseling; involved in community organizing and leadership activities; active in senior leadership and senior programs; and generally receiving housing-related services and information.

The rapid and successful growth was a very real response to the foreclosure crisis and the demand for assistance coming from all parts of the community. This left little time to plan ahead, prioritize or fully assess the internal and external factors and consequences of our growth. The Center's does not in any way regret stepping up to meet the serious housing challenges facing the community, but rather we know that this is not the best way to grow an organization long-term. One element that did not get developed during our growth was the management of our contacts.

We need to be able to track all of the organization's contacts efficiently and in a way that is easy to manipulate for queries, mailings and general outreach. While keeping the cost of doing this is a priority, it is not number one. Our priority is to find a system that is easy to input, easy to update and easy to use for a variety of purposes. It should be "dummy proof" and able to track a lot of information about our contacts.

Does this help?

Thank you, Cathy
- Hide quoted text -

On Sat, Mar 19, 2011 at 12:45 PM, Trina McNamara <mathemomician@gmail.com> wrote:
Cathy,

I heard recently about your sad loss. My sympathies to you and you family. You and Ray have been in my prayers since I heard the news.

It was recently suggested that I include in my final paper a short list of priorities that NWSHC has in looking for this database. For instance, the highest priority might be cost, the second might be ease of use, and so on. Can you provide me a list similar to this, and some insight into the reasoning?

Thanks again,

Trina McNamara

from Cathy Lazuka <cathylazuka@gmail.com>
to mathemomician@gmail.com
date Wed, Mar 9, 2011 at 5:56 PM
subject Re: two more questions hide details Mar 9
mailed-by gmail.com
signed-by gmail.com

I'd say a one time cost but we are flexible if the right product came along. As cheap as possible but will get the job done.
- Hide quoted text -

On Wed, Mar 9, 2011 at 5:50 PM, <mathemomician@gmail.com> wrote:
Mostly. Is the $500 a one time cost, quarterly or yearly estimate?

Thanks, trina

Sent from my Verizon Wireless BlackBerry

From: Cathy Lazuka <cathylazuka@gmail.com>
Date: Wed, 9 Mar 2011 16:19:13 -0600
To: Trina McNamara<mathemomician@gmail.com>
Subject: Re: two more questions

Hi Trina, I am sorry for the delay.

We really don't have a budget in place for this. We need to solve the problem, so I am guessing we would spend up to $500 to do that but free is also good.

In terms of controls, no more than 10 folks will have access to it and 2 to 3 would have editing ability. Does that answer your question?

Thank you, Cathy

On Sun, Mar 6, 2011 at 10:39 AM, Trina McNamara <mathemomician@gmail.com> wrote:
Cathy,

I was wondering if there is a set budget in place, or if there is a budgetary range I should be considering. I am looking at both on-line and on-site options, and think I may be at the point where I am ready to download and test some options I think are viable. So what I need is budget information, and access control levels. On-line options have a price per month or year based on support, number of people accessing, and so on. On-site options have initial software cost, support costs and so on. I will also need the number of people who will be accessing the data, and the potential access control list (John

Doe, admin; Jane Smith, Jill Brown, Jacob Johnson and Jason Peterson, users with Jason and Jane as editors).

Thanks for the help, I know this may take a few days to put it together, so no worries.

Trina

from Cathy Lazuka <cathylazuka@gmail.com>
to mathemomician@gmail.com
date Wed, Mar 9, 2011 at 5:56 PM
subject Re: two more questions hide details Mar 9
mailed-by gmail.com
signed-by gmail.com

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Thanks for the help, I know this may take a few days to put it together, so no worries.

Trina

from Cathy Lazuka <cathylazuka@gmail.com>
to Trina McNamara <mathemomician@gmail.com>
date Fri, Feb 25, 2011 at 3:30 PM
subject Re: update hide details Feb 25
mailed-by gmail.com
signed-by gmail.com

The email sent without me finishing it! How weird.

Hi Trina,

We are mainly needing a db that can contain all our contacts. We have a variety of different types of contacts and sometimes they have multiple associations with us. For example, Bill Jo Bob is a former client, donor and housing committee participant. We need to be able to query to find him for mailings or emails or holiday cards or donor appeals, ect. The mass mailings could be electronic or paper in nature - we do both.

In terms of what I sent you, I found something better. I am sending you the actual 1000 entry spreadsheet file. You'll that the first worksheet is everyone and then we pulled out lists for the holiday card, newsletter and paper copy of newsletter. I want us to not have all these sheets. I also know that if our list was actually comprehensive we would be looking at more like 2000 records. I don't actually know what columns w - aa are. Also, column A was supposed to be some code for how we know folks but I think we need to be able to enter multiple codes for the multiple ways people know us.

If you help us solve this mess, I'll be eternally grateful.

Cathy

On Wed, Feb 23, 2011 at 9:21 PM, Trina McNamara <mathemomician@gmail.com> wrote:
Cathy,

Sorry I forgot to forward the last update to you. I have enclosed it here.

I had a few more questions I was hoping you could answer. Are you able to send me blank examples of reports you are interested in generating with the database, and potential mass mailings? Will the mass mailings be electronic in nature or paper mail?

Also, the two field lists you sent me, do those contain separate information, like one is for clients and the other for supporters? I am just looking for some clarification.

Thanks,

Trina

nwshc contacts.xls
650K View Open as a Google spreadsheet Download

from Cathy Lazuka <cathylazuka@gmail.com>		
to	Trina McNamara <mathemomician@gmail.com>	
date	Fri, Jan 21, 2011 at 3:24 PM	
subject	Re: MS SBS question	hide details Jan 21
mailed-by	gmail.com	
signed-by	gmail.com	

From our tech:

I'm using an HP P212 RAID controller with a 256MB cache and a write-back cache battery backup configured RAID 5 with three 250GB hard drives and one hot spare. Its fast!

- Hide quoted text -

On Fri, Jan 21, 2011 at 12:51 PM, Trina McNamara <mathemomician@gmail.com> wrote:

Cathy,

Do you know, or can you ask your tech person, what RAID version you have on the new MS SBS? I assume that this is what you are using as a back up. If not, can you clarify what is used?

Thanks,
Trina

from Trina McNamara <mathemomician@gmail.com>

to	Cathy Lazuka <cathylazuka@gmail.com>	
date	Thu, Jan 20, 2011 at 2:16 PM	hide details Jan 20
subject	Re: a question or two	
mailed-by	gmail.com	

Thanks.
- Hide quoted text -

On Thu, Jan 20, 2011 at 2:13 PM, Cathy Lazuka <cathylazuka@gmail.com> wrote:
This is what our tech guy said. Regardless, we can not be buying another server so we will have to work within what we have.

"SQL 2008 Express is on the server by default and is part of SBS's function. Another DB instance can be installed if its a light load. Microsoft recommends keeping an SBS server dedicated as such. You will need a second server if you need to run full SQL of which we did not order the SBS Premium Add-on from Techsoup."

On Thu, Jan 20, 2011 at 1:48 PM, Cathy Lazuka <cathylazuka@gmail.com> wrote:
I don;t really know but I will ask our tech and get right back to you?

On Thu, Jan 20, 2011 at 1:39 PM, Trina McNamara <mathemomician@gmail.com> wrote:
Thanks Cathy, only one more question at the moment. Did the purchase of the MS SBS include the SQL 2008 add on that includes Windows Server 2008 R2 technologies? It would be the difference between the Premium and Standard versions of the Small Business server.

Trina

On Thu, Jan 20, 2011 at 11:54 AM, Cathy Lazuka <cathylazuka@gmail.com> wrote:
Hi Trina, We just had a Microsoft SBS 2011 installed and I believe exchange is built into it for Outlook. We all have Windows 7 and Office Professional 2010. Need to query for reports and mailings. The original field list is attached. It will change though.

On Thu, Jan 20, 2011 at 11:43 AM, Trina McNamara <mathemomician@gmail.com> wrote:
Cathy,

Can you tell me what version of Microsoft Office NWSHC is running, and if Outlook is run from an Exchange server, or online? Also, we may have covered this, but can you tell me are you looking to query data for reports as well as mailings, or only mass and targeted mailings? Do you know if Ray has a list of data fields that you would want to see in the database, even if it is not complete, or updated? Even a partial list should help me get started, and I may want to mention some of the fields in the paper I have due tomorrow.

Thanks a ton,

Trina