

INDIANAPOLIS HIKING CLUB

MAJOR PROCESSES – January 2004

Club Processes	Current Process Owner(s)	Also involved
Develop Hiking Schedule	Pathfinders - Cindy West and Ed Wright	
Distribute Schedule and Hike Leader Packets	Publications - Bill Larrison	Nell Larrison
New Membership Processing	Membership - Cherie Voegel	M Layman, Ellen Mutzl
Annual Dues Collection	Treasurer - Mary Ann Layman	Bill Larrison, Ellen Mutzl
Publish Roster and Maintain Membership List	Publications - B Larrison, Milage-E Mutzl	M Layman, Cherie Voegel
Update Member Mileage and Publish Trailblazer	Membership - Ellen Mutzl, Pub.- Bill Larrison	Hike Leaders
Maintain Club Web Site	Publicity - Reba Wooden	

The following Club processes were not reviewed because there appears to be little or no technology opportunity:

Leading a Hike
Club Overnights
Board Meetings
General Meetings
Nomination and Election of New Officers
Annual Financial Audit
Parties and Club Picnic
Media Publicity

IHC PROCESS: DEVELOP HIKING SCHEDULE

Process Owner(s): Pathfinders - Cindy West and Ed Wright

Current Process Summary: A schedule of hikes is published every two months, starting with the December - January schedule and ending with the October-November schedule. There are currently two pathfinders, one for weekend hikes and one for weekday hikes. The pathfinders identify the new hikes, type the schedule, confirm proposed hikes with the hike leaders, resolve any scheduling conflicts and present the proposed schedule to the Board of Directors for approval. Once approved, the new schedule is given to the Director of Publications (Bill Larrison) for printing and mailing to the membership. The pathfinders also maintain a Hike Leader file, which is a record of past hikes each hike leader has led. The pathfinders use this file to locate hikes in prior schedules so that the directions and description may be copied into the new schedule. Once the new schedule is published, the pathfinders save a copy of the new schedule in the club archives.

Current Use of Technology: PC based word-processors and e-mail are used extensively by the pathfinders to develop the new schedule, confirm hikes and distribute the completed schedule for review. Both pathfinders currently use compatible word processing software (Microsoft Word 2000), which greatly simplifies the process of developing separate weekday and weekend schedules and merging the results. A lot of cutting and pasting from past schedules (saved as Word documents) speeds up schedule development and significantly reduces errors that would result from retyping. Drafts are exchanged between the pathfinders via e-mail with a Word attachment. Prior to finalizing the schedule, the pathfinders send out confirmation requests to the hike leaders. The cut and paste feature greatly simplifies the process of sending out confirmation e-mails or letters to those hike leaders who do not have e-mail capability. On average, about 75% of the confirmations are done via e-mail. About two weeks before the start of the new schedule period, the completed schedule is e-mailed as a Word attachment to Board members for review prior to the approval Board meeting. Most Board members are able to open the Word document. A hard copy of the completed schedule (printed on both sides) is given to the Director of Publications for printing. The Hike Leader file (record of past hikes) is also a Microsoft Word document.

Process Cost: Since all labor is volunteered, the cost of the process outlined above is minimal. About the only costs are 10-15 stamps to mail hike confirmations to leaders who do not have e-mail and the cost of printing about 15 copies of the schedule for Board review.

New Automation Opportunities: Given that the current pathfinders have compatible word processors and e-mail, it is hard to envision how the current process might be simplified. The value of having compatible word processors cannot be overestimated. It should be a requirement that future pathfinders have access to e-mail, since most communication today between pathfinders, pathfinders and hike leaders, and pathfinders and the Board takes place electronically. It would be a major step backward to do otherwise.

IHC PROCESS: DISTRIBUTE SCHEDULE AND HIKE LEADER PACKETS

Process Owner: Publications Director – Bill Larrison (with a lot of help from Nell Larrison)

Current Process Summary: The new hiking schedule is reviewed and approved by the Board on the 3rd Thursday of the month prior to the new schedule taking effect. Bill Larrison receives a printed copy of the schedule at this time. He proofs it, makes minor corrections (white-out and type over) and appends additional information to the end of the schedule, including recent mileage awards, new member addresses, address changes and personal notes that Bill deems appropriate. From time to time, Bill appends a room reservation form for an upcoming overnight trip (e.g., Labor Day Weekend) that he is personally coordinating. An annual dues notice (separate sheet) is included with the October schedule. Approximately 700 copies of the schedule are printed (two sided) at a local Kinkos. The schedule is stapled, folded, stamps are added and mailing labels affixed. Ellen Mutzl provides Bill with mailing labels each month from the Excel Mileage database she maintains. Bill makes any corrections to the mailing labels he feels necessary from his personal copy of the membership list. In some instances, Bill may mail a schedule to a temporary mailing address (e.g., winter home) that he is aware of, although the club is not officially aware of the address. In addition to mailing the schedule, Bill also assembles and mails packets to each hike leader listed in the new schedule. The packets include sign-up sheets for each hike, new membership applications and extra copies of the schedule. All of the tasks described above must be accomplished in a very short time window (as short as five days), in order that the schedule and hike leader packets are received by the membership via US mail prior to the start of the new month.

Current Use of Technology: Other than the mailing labels that Ellen provides Bill from the Excel Mileage database and the use of a commercial printer, no automation is currently used in this process.

Process Cost: All of Bill and Nell's labor is volunteered. It costs about \$700 to print and mail a schedule and hike leader packets. This process occurs six times per year for an annual cost of about \$4,200, clearly the largest expenditure in the Club budget.

New Automation Opportunities: It would be hard to imagine anyone other than Bill, who would have the dedication, preciseness and energy to accomplish the tasks outlined above in so short a time period. When the day comes that Bill is no longer able to continue owning this process, in all likelihood, the schedule approval process will need to be moved up at least one week to give Bill's successor(s) more time to accomplish the tasks. One possible alternative would be to publish the schedule on the Club web site for those members willing to pull it up and print it electronically. Hike leader information (e.g., sign-up sheets and new membership applications) could also be printed from the web site. Although this would not eliminate mailing, it would probably reduce the number of mailings and cost by 50-70%, making the remaining effort more manageable. There are a number of Club policy issues that would need to be revised (e.g., names and phone numbers on-line) before the entire schedule could be put on the web.

IHC PROCESS: NEW MEMBER PROCESSING

Process Owner: Membership Officer (Contacts) – Cherie Voege

Current Process Summary: Prospective new members find out about the club many ways, including being invited as guests on a hike, read a hike description in a newspaper, view the Club web site, word of mouth, etc. Some call Cherie (Membership Contacts) directly to obtain information about the club. Most probably sign a hike sign-up sheet as a guest. Ellen Mutzl, who receives hike sign-up sheets from hike leaders, passes along guest contact information to Cherie by e-mail. Cherie contacts the guests and sends them a schedule and membership application, if they have not already received one from the hike leader. New membership applications and dues checks are sent to Cheri. If Cheri receives a new membership application close to the end of the Club year, which ends on September 30, she often holds it until after October 1 so that the new member won't have to pay dues for two years. Cheri presents a list of prospective new members for approval at each monthly Board meeting. This list is used by Ellen Mutzl (Milage), Bill Larrison (Publications) and Mary Ann Layman (Treasurer) to update their copies of the membership list. Cheri passes along checks received with the application to Mary Ann and orders name badges for the new members who requested one on the application form. Bill appends the name and address of new members to the next hiking schedule.

Current Use of Technology: Other than occasional e-mail exchanges, little if any automation is used or needed to manage this process. The different versions of the membership list appear to be maintained independently. Bill and Cherie maintain paper lists. Ellen and Mary Ann maintain theirs on a PC.

Process Cost: Once again all club labor is volunteered. There are some modest costs associated with Cheri making long distance telephone calls and mailing schedules and applications to prospective members and mailing name badges.

New Automation Opportunities: Cheri could e-mail new member names and addresses (and mileage awards) to the pathfinders for inclusion on the schedule which is reviewed by the Board on the 3rd Thursday of the month, relieving Bill of having to type these on to the end of the schedule. Otherwise, not much opportunity here.

IHC PROCESS: ANNUAL DUES COLLECTION

Process Owner: Treasurer – Mary Ann Layman

Current Process Summary: The Club year runs from October 1 through September 30. New members pay when they join. Bill Larrison (Publications) includes an annual dues notice (separate sheet) along with the October-November hiking schedule. A reminder is included in the December-January schedule. In January, Bill sends a final reminder notice (separate mailing) to each member who has not paid. Mary Ann Layman (Treasurer) receives cash or checks (either directly or via hand off) and keeps track of who has paid. In early January, Mary Ann gives Bill and Ellen Mutzl (maintains mileage) a list of members who have not paid. Bill uses this to send out the final notice. Ellen uses this same list to determine who should be deleted from the Mileage database (see Mileage Process). Bill or Mary Ann will advise Ellen when a former member subsequently pays their dues and Ellen will reinstate them in the Mileage database with the same mileage totals they had when they were dropped. If a dropped member shows up for a hike and signs in as a member, Ellen will record them as a guest (i.e., they will not receive mileage credit for the hike).

Although any officer can propose a budget change, as Treasurer and keeper of the annual budget, Mary Ann would be the most likely person to recommend any adjustment to the annual dues. This would typically occur at the August or September Board meeting.

Current Use of Technology: Mary Ann maintains her own PC membership database to keep track of who has paid and to produce a list in early January of members who have not paid.

Process Cost: Very modest. About the only cost associated with this process is for the printing and mailing of final reminder notices.

New Automation Opportunities: Not much, other than consolidating to one membership list shared by Mary Ann, Bill and Ellen. It would seem the Mileage database is the most logical place since it needs to be kept current with who has paid and who should be dropped.

IHC PROCESS: PUBLISH ROSTER AND MAINTAIN MEMBERSHIP LIST

Process Owner: Publications - Bill Larrison Also maintain rosters - Ellen Mutzl, Mary Ann Layman, Cherie Voegel

Current Process Summary: As described in the Annual Dues process, each January members who did not pay their annual dues are dropped from the roster. Ellen Mutzl (Mileage) deletes unpaid members from the Mileage database (she actually saves them in a separate file in case they are subsequently reinstated) and prints out a roster of current members and mailing labels for Bill Larrison (Publications). The roster includes name, address and phone number. Bill carefully checks the contract information for accuracy and retypes the roster on Club letterhead and mails it to all members in late January. Mary Ann and Cherie Voegel (Membership Contacts) probably update their personal copy of the membership list from the roster Bill distributes.

Throughout the year new members are added (see New Member Processing) and addresses and phone numbers change. Bill and Cherie are usually the first to find out about address or phone number changes. They inform each other and Mary Ann and Ellen. Bill appends recent address and phone number changes to next hiking schedule.

Current Use of Technology: Ellen prints the roster of active members and mailing labels directly from the Excel Mileage database. However, Bill currently retypes the list since he doesn't have a PC. Bill maintains his roster manually as does Cherie. Ellen and Mary Ann maintain theirs on a PC.

Process Cost: The cost of printing and mailing the roster to all members each January approximates the cost of producing and mailing a hiking schedule. Other than the free labor involved, it costs nothing to maintain the roster.

New Automation Opportunities: It would seem logical to print the roster that is mailed to the membership directly from the Mileage database, without retyping. Ellen believes this would be easy to do. Although Bill is comfortable with the current method, it is unlikely that any successor would want to continue to retype the list.

Although putting the membership list on the Club web site would reduce the effort and cost of mailing the roster to everyone, there are a number of reasons why this is probably not a good idea. First, some members are likely to resist having their names and addresses published for the world to see (suspect this is less of an issue for hike leaders). Second, putting the roster online would open up the membership to mass solicitations from vendors who could simply copy the roster off the web. The Club has a long standing policy against giving the membership list to vendors.

IHC PROCESS: UPDATE MEMBER MILAGE AND PUBLISH ANNUAL TRAILBLAZER REPORT

Process Owner: Membership Officer (Milage) – Ellen Mutzl; Publications – Bill Larrison (Trailblazer)

Current Process Summary: At the completion of each hike, hike leaders are supposed to send sign-up sheets to Ellen Mutzl, although sometimes she has to pull teeth over many weeks to get them. Ellen records information about each hike and member mileage in an Excel database. Actually, the so called database is a collection of five separate Excel spreadsheets: one for member contact information (i.e., name, address and phone number); one for member mileage (prior year total and current year mileage by day); one for hikes, listing leader and the number of members, guests and children in attendance; one for guest and children's names; and a spreadsheet to save information for deleted members (i.e., did not pay dues) in case they are reinstated in the future. The process for updating the contact information has already been covered in New Member Processing, Maintain Membership List and Annual Dues.

After updating the mileage, Ellen forwards any guest contact information included on the hike sign-up sheets to Cherie Voegel (Membership Contacts) via e-mail. Cherie then follows up with the guest (see New Member Processing). Ellen then sends the sign up sheets to Bill, who files them (???)

If Ellen determines that a member has reached a mileage award threshold (e.g., 100, 1,500, 12,000 miles), she advises Cherie via e-mail. Cherie publishes a recognition list to be included in the next hike schedule. She also orders a recognition badge (i.e., hiker name and milage) if the award is a multiple of 1,000 miles. Ellen will send recognition patches to members who have reached mileage thresholds below 1000 miles (e.g., 100, 200, 300 miles).

The information in the five spreadsheets is the source data (printed reports and mailing labels) that Bill Larrison (Publications) uses to produce the annual Trail Blazer report (member mileage recap) that is mailed to all members in October and the Club Roster (see Publish Roster process) that is distributed to the membership in late January.

Current Use of Technology: Although mileage used to be maintained by hand, given the size of the Club and the large number of hikes (about 25 per week) it would be very difficult to revert back to manual record keeping. Although an integrated database would be nice, Ellen believes the current Excel process is quite straightforward and not overly time consuming. It is mandatory that anyone doing Ellen's job in the future is reasonably proficient in Excel or whatever database environment that the mileage database may be migrated to.

As previously stated, Ellen provides Bill with reports and mailing labels he uses to produce the annual Trail Blazer and Club Roster mailings. Ellen also provides Bill mailing labels for each hiking schedule.

Process Cost: In its present setup, only Ellen needs access to the Excel database. The Club owns one Excel license. The mileage and membership list update process is quite time consuming, but it is hard to imagine it being otherwise. There are modest out of pocket costs associated with the purchase of mileage award badges (Cherie) and mailing recognition patches (Ellen). The cost to print and mail the Trailblazer report each October is comparable to mailing a hiking schedule.

New Automation Opportunities: Although the current Excel spreadsheet environment is a bit cumbersome (5 separate spreadsheets) when compared to an integrated database environment, Ellen feels it is quite workable and not overly labor intensive. Usually only two spreadsheets need to be touched for each hike sign-up sheet, three if Guests are in attendance. The effort could be reduced somewhat if we stopped recording Guest/Children names and overnights, which seems to serve little or no purpose today, other than to list Children's names and the number of overnight hikes members attend in the annual Trail Blazer report. When Bill hands off mailing of the Membership Roster and Trail Blazer to someone else, an effort should be undertaken to produce these reports automatically from the mileage database, which should not be a major undertaking.

Migrating the Excel spreadsheets to an integrated database environment would certainly simplify data entry (if properly designed and kept simple) and would facilitate the development of custom reports. Microsoft's widely used Access database tool would seem to be the most logical tool to accomplish this. However, unless a member is willing to undertake development as a no-cost project and the resultant product was very easy to use and maintain, migration away from Excel does not appear to make sense.

In future, when (if) we develop a new Web site, we could certainly save the annual Trail Blazer report on the web and cut down on printing and mailing costs. It might also be desirable to include more frequent mileage and hike recaps (e.g., monthly), although doing this may result in the Mileage officer getting even more inquiry phone calls (e.g., I thought I had more miles?) than she does today, since mileage updates often lag hike dates by months due to delays in receiving sign-up sheets.

IHC PROCESS: MAINTAIN CLUB WEB SITE

Process Owner: Director of Publicity – Reba Wooden

Current Process Summary: Our existing web site was developed by Reba Wooden about four years ago, shortly after she became Director of Publicity. At the time (and to this day) Reba had had no formal training in web development. As a subscriber of WebTV Internet service, server space was made available to Reba to create up to four modest size personal web sites for her own use. Using the rudimentary tools WebTV provides, Reba created the Club web site and over time evolved it into what it is today. The rather confusing web site address (i.e., [http://community-2.webtv.net/...](http://community-2.webtv.net/)) was assigned by WebTV and outside of Reba's control. The site currently contains some Club history, contact information, names of officers, a few hike photos, links to other hiking related sites and (most importantly) the current month's hike schedule. Reba maintains all of this information herself. Because of the limited space provided and the time-consuming data entry process, Reba sometimes only enters one month of hikes at a time. The hiking schedule is abbreviated and formatted differently from what is mailed to the members. Accordingly, few members seem to use the web site, although most have Internet access from their home. Still, quite a few new members first learn about the Club from the web site.

Current Use of Technology: Reba is restricted to the limited space made available by WebTV and the difficult to use tools they provide. Entry and correction of text are two separate cryptic processes, which is the main reason why hike descriptions have been truncated and errors are more commonplace than Reba would like. Reba is able to insert clip art from a limited WebTV database (e.g., picture of a snowman) and a few photo's or scanned images (e.g., Club logo at the top of the site). Per Reba, it is an increasing challenge to keep the current site updated and going much beyond what is there today is probably not feasible.

Process Cost: Since Reba is already a WebTV subscriber, the web pages where the Club site resides and the tools to maintain it are free to her and the Club. Reba donates all her labor, which is significant. What a deal for the Club!

New Automation Opportunities: Although Reba is willing to continue to maintain the existing site for now, she believes the time has come for the Club to develop a new site, free of the restrictions imposed on her. She has not researched what would be involved in registering an easy to remember site address, such as "Indyhikingclub.org", and point it to the existing or new site.