Supplemental Materials for:

Information Management Platform:
A Solution to Tracking Caras con Causa's Impact on Cataño and Guaynabo

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Report Submitted to:
Caras con Causa
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A. Impact of Puerto Rico's History on the Island

Puerto Rico has amassed a great number of problems since its union with the U.S. Many of the difficulties they are facing today can be attributed to Puerto Rico's territorial status and the economic decisions taken by the federal government in the 20th Century. Between the 1940s and the 1960s, the United States implemented a program, known as Operation Bootstrap, that gave corporations tax exemptions. This enticed mainland companies to move their operations to Puerto Rico and industrialize the island. As a result of industrialization, the gross national product, income, and literacy rose, while death rates fell (Immerwahr, 2020, p. 258). Regulations, however, did not follow these corporations. The SEC's regulations were excluded in Puerto Rico, which allowed corporations to truly operate in a free-market economy (Osoria, 2020). As a result, the Puerto Rican economy became more dependent on mainland corporations' interests and decisions. During the recession in the 1970s, Congress passed even more tax exemptions to stimulate the Puerto Rican economy. Seeing the territory as a tax haven, companies flooded in and the economy improved. In 1996, Clinton repealed the exemptions and phased them out over ten years. Many corporations saw no real incentive to stay in Puerto Rico and left. The increasing unemployment left the tax base eviscerated and forced the government to take on a large amount of debt. Two years after the tax breaks were phased out, the Great Recession of 2008 occurred and caused more damage to the already declining economy. Debt continued to add up and the federal and local governments continued to implement neoliberal policies promoting austerity rather than relief.

The cycle of poor policy decisions followed by embarrassing responses has been a major factor in Puerto Rico's poor economic standings. In 2018, Puerto Rico's poverty rate was 43.1%, which is more than double the highest state poverty rate of 19.7% in Mississippi. Approximately 75% of people of age 25 and older have a high school diploma, but only 25.9% of those people have graduated with a Bachelor's degree (Census Bureau, 2015-2019). The recent hurricanes have only exacerbated these problems. Since May of 2017, schools have lost 38,762 students and as a result, Puerto Rico decided to close 283 schools (Chavez, 2018). Puerto Rican migration has also contributed to these problems: "Of all living Puerto Ricans born on the island, more than half have moved elsewhere, with about 130,000 residents fleeing to the mainland after Hurricane Maria alone" (Cheatham, 2020). It is projected that Puerto Rico's population will be below 2 million by 2040 (Chavez, 2018). This leaves fewer taxpayers to deal with the crippling debt. Hurricane Maria had a disastrous impact on the island and led to a humanitarian crisis. The Category 4 storm directly hit the island and took down 80% of the island's power lines leaving 3.4 million people without power. The storm also took down a majority of cell towers, which made responding to the disaster even more difficult. Hospitals were forced to run on generators which led to life-threatening emergencies (Resnick & Barclay, 2017).

Despite Puerto Rico's territorial status, they are still entitled to a strong government response but received nothing of that nature. The Jones Act limited shipments to Puerto Rico, raising shipping prices to an island where nearly half the population is living under the poverty line (Yglesias, 2017). During disasters, the bill is waived to allow for quicker economic relief. The Trump administration temporarily waived the Act but refused to renew it when it expired (Resnick & Barclay, 2017). Two years after the hurricanes, FEMA officials stated that only 190 projects of the 9,000 project requests have been funded (Walker et al., 2019). FEMA also only disbursed $3.3 billion in relief to Puerto Rico's government by April of 2019 which was only 59% of the obligated funds (Honl-Stuenkel, 2020). The inadequate and delayed response has done little to relieve the many problems Puerto Ricans are facing.

B. Focus Group Questions

Questions	**Group 1: Ecology & Education**	**Group 2: Operations & Administrators**	**Group 3: School**
What are your specific roles in the organization?			
On a daily basis who are you in contact with? Who are sharing information with? (Follow Up) If it is only viewable and editable by staff, are there data you would like donors and volunteers to allow viewing access to?			
What information are you currently keeping track of for your team/project? (Follow Up) Do you reference back to any of the information? If so, which ones? When an audit or fundraise event occurs, what are the steps that the organization takes?			
How/where are you currently keeping all your information?			
How are you organizing your data?			
Do you visualize any data using charts or maps? (follow up question) If you currently don't visualize data, would you prefer if some of the data is visualized in charts or with other means? If you do prefer to visualize the data, which of the data types?			
How/where are you sharing this information?			
Who are you sharing each specific type of data with? (Follow Up) who is sharing project data with donors? Who is in touch with external stakeholders?			
What information specifically is being shared? Is it personal information that is going to a lot of the staff about the volunteers?			
What do you like about your current tools and methods of organizing and visualizing data?			

What do you like about your current tools and methods of sharing data?			
What do you dislike about the current tools and methods of organizing and sharing data?			
What is your ideal way to manage your data? Visual data, Excel sheets or both or something more efficient? (Follow Up) Would you want to put all the data in one excel sheet?			
How do you feel about transitioning to a new platform? Do you believe it is essential or do you think refining the current method is a better way?			
Department of education mandated software? (TEAM?)			
What is the maximum amount of funds you can allocate for a new platform?			
How are the donations collected and stored? Who keeps track of donors and donations?			
Is there anything else you would like to tell us?			

C. Focus Group 1 Answers in Meeting Minutes

What are your specific roles in the organization?

1. Participant 1:
    a. Volunteer Coordinator (Volunteers from US; any type of service learning or paid volunteer services)
        i. Work w/
            1. Participant 6 to coordinate w/ community leaders to check the needs
            2. Project coordinators: Participant 2, Participant 4
            3. Tutoring center to connect volunteers to who needs help
    b. Economic Development Coordinator: work w paid experienced volunteers (corporate groups & universities)
        i. They often include donations with the service they wish to receive, the money is then used for organization's benefits
2. Participant 2: Project Coordinator for Labcom
    a. Community Lab for environmental scientist that works w/ the seven schools in Catano & Guaynabo community
3. Participant 3: Coordinator for Tracadio (Access for students from 6-12th grade)
4. Participant 4: Project Coordinator for Urban Roots
    a. Reforest and recreate gardens in the school as well as throughout the community, focus is the North part of Guaynabo
5. Participant 5: Education Coordinator for Labcom
    a. Link the purpose of the project to the school curriculum
6. Participant 6: Community Coordinator
    a. Work with community organizing and leadership
    b. Alliances with other organization that Caras collaborates with
7. Participant 7: Lab Assistance and Field Data Collector for Labcom
    a. Assist and run all projects in Labcom, work w/ Participant 2
8. Referenced as Participant 8: Founder
9. Referenced as Participant 9: Reforestation Officer

On a daily basis who are you in contact with? Who are sharing information with?
Everyone has their own folder; share as needed. Team communicates with everyone but there are people they are more in contact with.

1. Participant 1: If people within the organization is filling out a grant and need previous years record
    a. Share mainly w/ Edgardo (finance) & Michael (director)
    b. Share volunteers, supervisor, and coordinator throughout the year.
        i. Volunteers would be reported under their project, not on Participant 1's report
2. Participant 2: Everyone has access & if anyone needed access, they would be granted.
    a. Use google drive database
        i. Manage all the papers, forms, participant info
    b. Everyone is labcom; files are all stored individually and together as needed
    c. Stored in Google Doc, share w/ teachers regarding students
    d. Communicate w/ people at the schools, Coordinate w/ Participant 3. Then Participant 3 documents and communicates with them as needed.
    e. Tries to ensure that all past files are stored so that anyone that comes can continue
    f. Students and teachers may be confused about how to fill out the online application, so they have a hardcopy and later it is thrown on the drive.

3. Participant 3: Use Google Drive to present a table to show the students assistance in the college
    a. Participant 4 (gives assistance in telling her how many students attend) & Participant 2 shares info with her. Mainly share w. Michael mainly, as needed
4. Participant 6: Communication depends on project tasks. Mainly communicate w/ Michael
    a. Has a shared folder so that it pertains to a certain event. Once the event finishes, it just remains in the shared drive.
5. Participant 4: Mostly communicate w/ Participant 5, Participant 2, Participant 3 (record contact and hours of students for the school).
    a. Use Excel Spreadsheets

For Urban Roots or any other programs, what data are you collecting from students and participants?

1. Participant 3:
    a. In trajector: name of school, grade they're in, occupation interest, participation in different workshops in the school
    b. Stored in google excel sheets
        i. I.e. If they began in 6th grade then how many workshops did they participate in?
    c. College Board: school, grade, how many hours participated
2. Participant 4: Use excel spreadsheets
    a. Info: how many plant are being nurtured, how many are dying, donations, species planted, students, contact info that students must fill out (name, age, grade, interest, reason for participation)
3. Participant 6: Isn't tracking personal info
    a. Track meetings with different people and organizations through google form to track who she met with and the purpose of the meeting.
4. Participant 1: Document institution, hour of intervention/meeting (virtual service), how many participants, type of activities completed
    a. Reach out to collaborator: [Amizade](#) (specialize in service learning; connect with universities and high schools they can work with. They provide the info so Participant 1 doesn't have to collect them herself.
5. Participant 5: every project has its own way of documenting
    a. In staff meetings, that would be mentioned and it's a way to sometimes avoid overlapping.
6. Participant 7: Anecdata is this platform where they post all data and its a way to store and share (with public) all data
    a. Viewers does not need an account
7. Participant 2: Create a report to complete each time they finish an activity that must be recorded for the projects, acts as a diary.
    a. Enables tracking of everything that is done

When files are overlapped, where is it stored?

1. Currently everyone has their own gmail account and share around as needed. Usually have a common doc to work together but also have individuals to work separately.

Do you need to visualize any data using charts or maps?
Not all data are currently being visualized but would love for it to be

1. Participant 3: No visual data yet, in trajector only use sheets to classify at the moment (classify by each school and graduating class)
    a. Started tracking workshops and activities they have participated (would prefer a visual data here; no visual for workshops yet)
    b. For college board reviews they used a chart to track how many students from different school

How do you keep track of donations? How/where are you sharing this information? Do you share it with donors too?
Work individually and eventually share with Michael to share with donors. Had no issue with donors needing something that donors wanted. Michael provides the budget estimate, each member works off of that and record as needed.

1. Participant 3: Recently had a donor in collegeboard, reported an annual report (students impacted, help given)
2. Participant 1: Labcom & Urban Roots deal directly w/ donors
3. Participant 2: For labcom donors, it is prepared every 6 months. Due to the pandemic it's prepared every 2 or 3 months. They are asked how many people are impacted, depending on the donor, they will ask for certain data. Most info they gathered have been useful for this purpose.
    i. Other things asked: how many students have you impacted, how many teachers are helping, does the webpage represent the projects, how are you using the funds.
   b. Use zoom calls to share these data, main method to share is through email with Michael, then report is prepared.
4. Participant 4: Share info to Michael to eventually be shared
   a. Information contains: students impacted, communities, trees planted.
   b. Does not meet with donor, it's usually Michael that meets
5. Participant 1: In the past, had demographics that were not recorded to get grants, however currently do not have that problem.

What do you share externally? With volunteers?

1. Participant 1: Has information sheets to share. Will also communicate with each project manager and determine if they need volunteers. Then she would let volunteers know the exact activity they will be working on.

What do you like about your current tools and methods of organizing and visualizing data?
Like that they can communicate and easily share and access info. Dislike the amount of documents shared and file/data duplication.

1. Participant 1: Would prefer a base format for everyone to access info. Maybe a single document that everyone shares onto
   a. Dislike the amount of documents being shared; searching each one when you need information is a hassle
2. Participant 3: Like that Google drive is easy to share with the rest of the group. Easily able to grant and receive access to information.
3. Participant 2: Dislike duplication of files
   a. It would be great to have a platform that anyone new that is coming onto the team can work off of what the group has rather than recreate.

Do you spend a lot of time emailing each other back and forth for this info?
Currently, it is quick and easy to email and get access, they simply message or call each other.. (must focus on the idea of organization expansion)

1. Participant 3: It is pretty quick. Just call and receive access
2. Participant 2: Information is quickly shared and easy to use through Google Drive

Is WhatsApp a platform the whole organization uses?
They just use WhatsApp for anything and use it as a way to touch base.
They have a group chat to send announcements and unavailability on certain days.

Do you feel like your current method of tracking is sufficient? Do you prefer adding onto the current platform or do you think you need a whole new system?

1. Participant 3: We need to center the information to track throughout the project
    a. Once a student graduates, they can see the participation and how he moves throughout Caras
2. Participant 1: In short term, it may be easy to track but in the long term it might be hard to visualize and understand

Participant 6: Believe that Caras needs to be better centralized so that everyone is on the same page.

D. Focus Group 2 Answers in Meeting Minutes

Specific roles in the organization

1. Participant 2: Human Resources Coordinator
2. Participant 3: Communication Manager
    a. Keep in touch w/ community in social media aspect
3. Participant 4: Finance Coordinator
    a. Work with payroll
4. Participant 5: Founder

On a daily basis who are you in contact with? Who are sharing information with? On a daily basis, who do you share info w/ how do you keep the info?

1. Participant 4: Work w/ payroll, provide supplies to different projects
    a. Use Whatsapp & email to contact different vendors & employees to best help w. their needs
    b. Store information in QuickBooks (an accounting software)
2. Participant 2: Work with anything involved with the staff within the organization, from interviews to contracts. Communicated w/ staff & absences to provide the most essential help.
    a. Can also help them schedule a meeting with parents
    b. Team currently has to fill out a form everyday for COVID which is kept and recorded through google forms, as well as spreadsheets.
3. Participant 3: Create content to be shared on social media, work more with the school (often create announcements by keeping in touch with the school, Participant 5, leaders of the programs)
    a. Share through facebook and instagram
    b. Believe they need a place where donors, community and volunteer is stored, to eventually share through email (not everyone is on social media)
    c. Data collected: Currently has a table to include picture and description, however would like a visual to see how many people view certain posts
        i. Also wish to have follower engagement but currently doesn't have much engagement
    d. Currently not looking on statistics (post's likes, shares, etc); but supposed to

What do you like about your current method of data storage?

1. Participant 2: Not using a platform right now
    a. Would love to use excel but it would be better to have a place to store information of all the employees and interns (like attendance) for better outreach
        i. Currently is interviewing many people but would like to have an excel to store all the info
    b. Data only shared with leadership and anyone else in the organization. [22:39]
2. Participant 4: Use QuickBooks to keep track of vendors and expenses. Use ADB (will be changing to a similar and local company to ADB) to enter payroll
    a. Would also wish to use ADB to order lunch together and send summary of attendance to employees
    b. Like QuickBooks, it gives great reports. Like that if they needed any info, it's there. It's also very user friendly
3. Participant 5: Currently would like one database to store information of a participant to understand their background upon reporting on a participant/staff.
    a. Upon recording the excel sheets, they must ensure that it is safely stored on USB and dropbox (more confidential. Only put things to be shared on Drive.

How does anyone feel about transitioning to a new platform?

1. Participant 2: like excel but if we have another platform, that would be better
2. Participant 3: Would love a centralized platform, not everyone shares info in google drive

Do you think your team will need a lot of technical support?

1. Participant 5: Believe that he would need a lot of technical support

Financially speaking, CRM requires a lot of fundings? Would it be possible to allocate fundings?

1. Participant 5: If the desire is there, the money will be. We will allocate funds as needed.

How and where are you currently keeping track of donations and grants?

1. Usually put donor of project and amt its applied to
2. Many times caras proposes and then the donor will tell them what to do
3. Wishes to use CRM to manage not just donors but also volunteers
4. Individual donors:
    a. prefer check and send by mail.
    b. Used to use paypal but then through Squarespace it became more difficult to donate on websites.
    c. Currently used a more local paypal: ATH Movil, can send directly to the phone.
    d. Currently signed up through ebay and amazon campaign; hasn't received any funds.
    e. No one has advertised for donations on social media. Participant 5 felt uncomfortable about it because he didn't want to be a “money money money” organization

Other

1. Inventory: has barcode to scan and keep track of how much stuff is left is be used
    a. Participant 4: Currently keep spreadsheet on computer, not shared w/ anyone. Only shared w/ himself, another guy and Participant 5 when he asks.
2. Reporting services: for budget services
3. Participant 3: Through social media, they usually ask where they can volunteer but no one asks for donation.
    a. Usually guide them to other people but Participant 3 haven't thought of keeping track if whether people usually come
        i. Would like to enable tracking volunteers that come through social media in order to refer them to another program as needed.
    b. Want to thank them by tracking the amount of time they've volunteered.

E. Focus Group 3 Answers in Meeting Minutes

What are your roles?

1. Participant 2: Volunteer Coordinator
2. Participant 8: Project Coordinator for Labcom
3. Participant 4: Founder
4. Participant 3: School Director
5. Participant 5: Coordinator in Spanish & History
6. Participant 6: Math Coach
7. Participant 7: Counselor; coordinator of the office of student services,
8. Participant 1: Coaches of Art program, physician education, science.
    a. Helped open the school

On a daily basis, who are you in contact with? Contact anyone in another project within Caras?

1. Participant 1: Participant 5 ,6 & her have a tight communication. Twice a week w/ counselors and social workers. Teachers in science and certain programs. Also work w/ Participant 8 & Participant 2
2. Participant 6: Special education teachers, math teachers, any role that works w students
3. Participant 5: Student, teachers, special education students
4. Participant 3: student, parents, teachers, social workers
5. Participant 7: families, teachers, anyone within community and around the school

Do you track any information? Ex. student participation, grade, etc

1. Participant 3: keep electronic records of grades and attendance. Acts as registrar that keep in touch w. Parents when students are absent. Share info with social workers.
    a. Creates infographics for everyone
2. Participant 1 Q: keep track of results of the grades on kids by using Excel and SIE (Sistema información estudiantil)
3. Do not mail the infographics, instead it is emailed

Do you have a separate of the Labcom students or do you share it together?

1. Participant 1: we don't share it. Teachers keep track of attendance, usually done manual and later inputted online (SIE).

What do you use to illuminate education and mastery?

1. Google drive, used for social workers and teachers. Currently looking into the illuminate education and mastery to see how it improves student skills and overall performance.
    a. Will eventually be used to contact with students and parents
    b. Illuminate Education and Mastery are examples of what could be used, potentially acquire for the school, but it is not something the school uses now

Was there anything you did not like about the current method of data tracking?

1. Participant 3: want to use another form so they can view real time students' assistance. As well as see students improvement and evaluation. You can currently see their grades but not see their real time education performance.

Is SIE a mandated platform that must be used?
Yes.

Are there any other duplications beside from Labcom

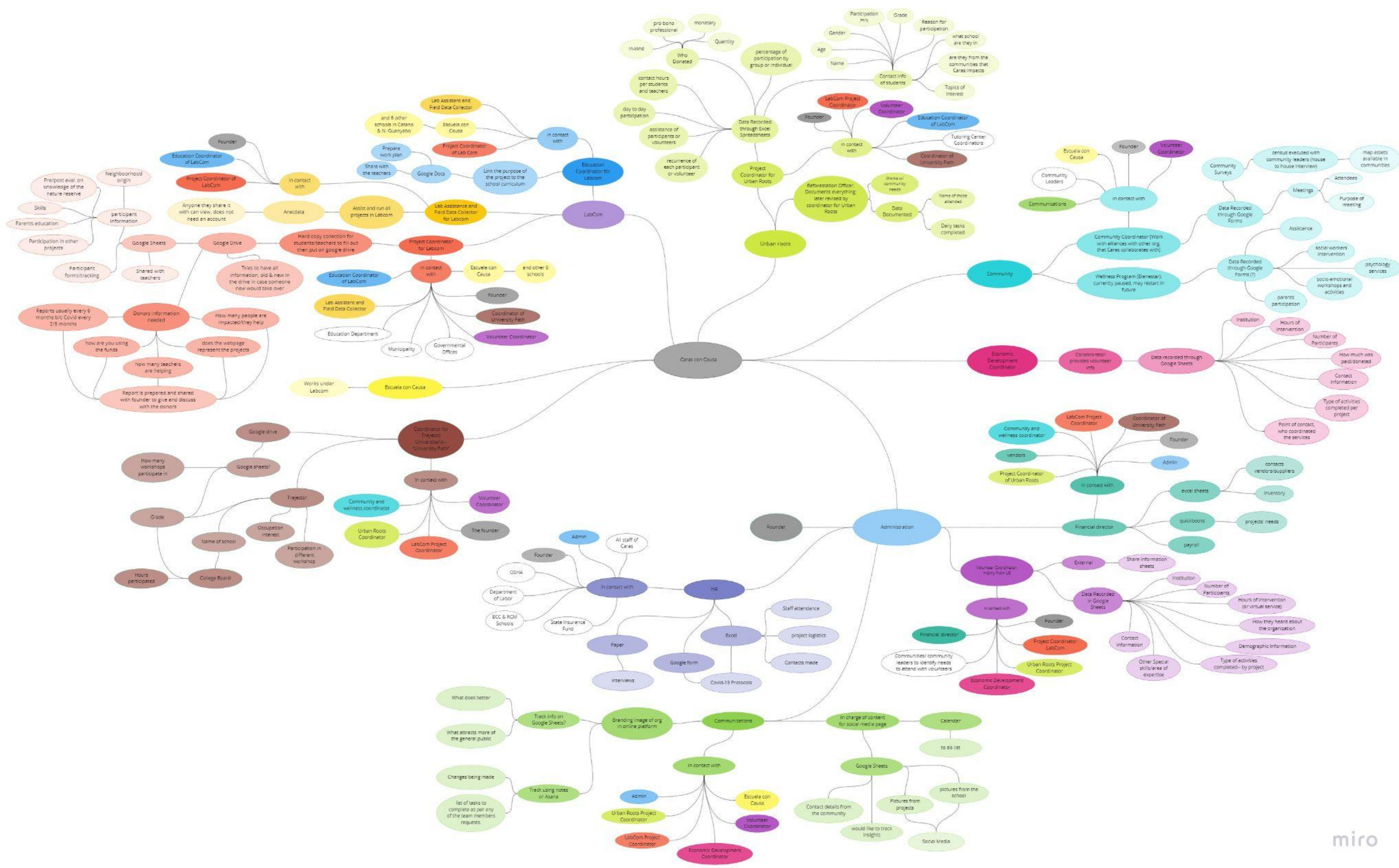
1. Participant 1: Service hours are done through the school
    a. As part of the class, high schools do 30 hrs. Divided into small groups and they perform tutoring/deforestation to complete the hours. This is done as an afterschool activity.
    b. The hours are on SIE, it's a required criteria for graduating

F. Caras con Causa's Current Projects

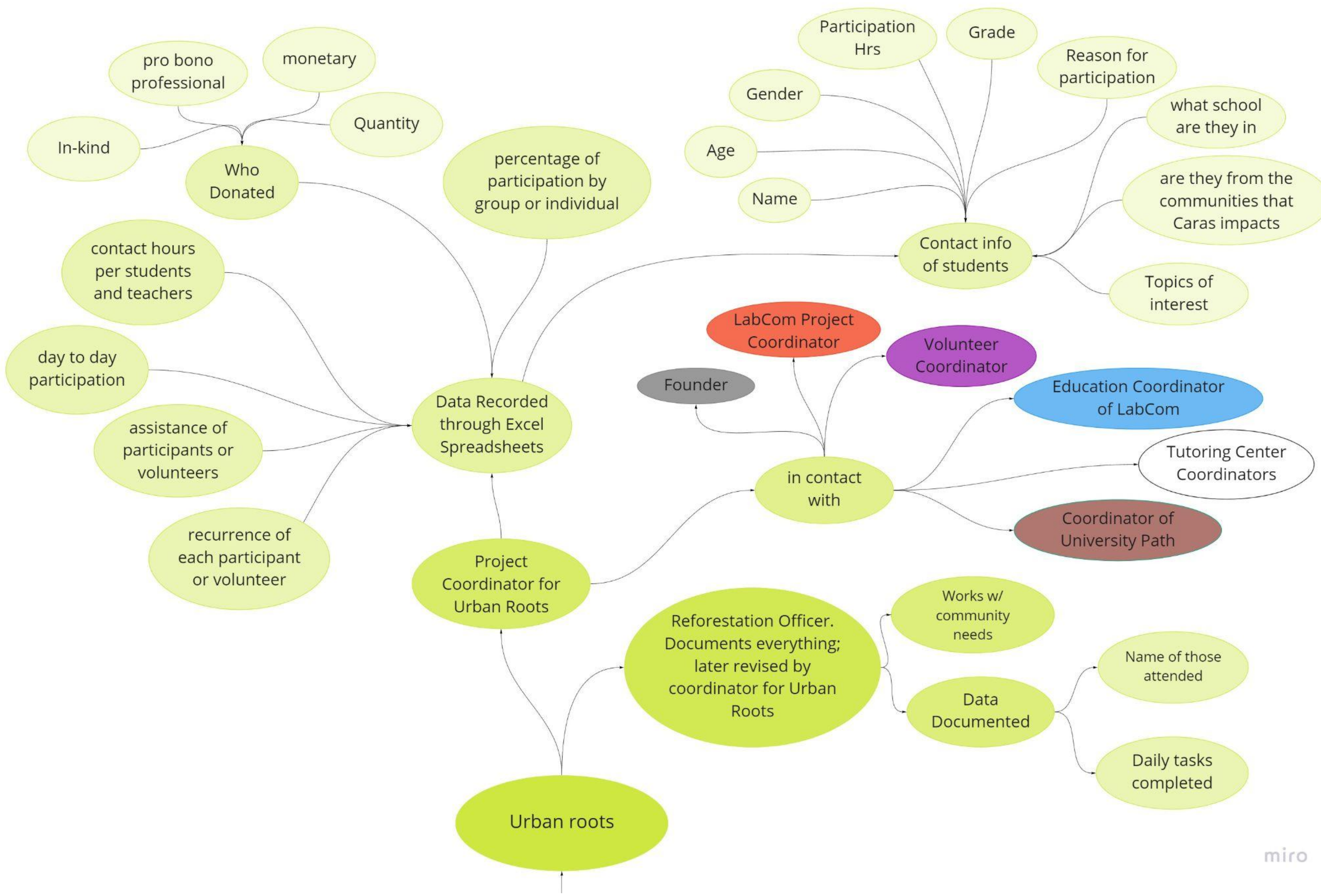
Project	**Mobile App: Community Relief**	**LABCOM**	**Jaun Matos Estudia**	**Vivero Antillano**	**Urban Roots**	**Héroes del Humedal**	**Economic-Community Development**
Target Audience	People affected by the hurricanes	Students	Students	Students & Residents	Students & Residents	Students	Residents
Key Program	Community	Ecological	Education	Ecology	Community	Education	Community
Data being recorded	Items needed after the disaster	Attendance	N/A	N/A	N/A	N/A	N/A
Purpose	Avoid item duplication & enable donors to be aware of what to donate	Provide educational experience through projects relating to the environment	Provide tutoring, mental health services, and workshops.	Nursery that produces native, endangered, and endemic trees. Also serves as an educational tool for students	Reforestation program in Las Cucharillas Natural Reserve. Carries out educational and participatory plantings to the deforested land.	Extended-day program with a focus on STEM. Provides tutorials, activities, and tours of the Las Cucharillas Natural Reserve.	Creating jobs and promoting projects for economic development.
Method of File Saving	Excel	Excel	N/A	N/A	N/A	N/A	N/A
Obstacles	Lack of Funds	N/A	N/A	N/A	N/A	N/A	N/A

G. Focus Group Findings: Cara's con Causa Employee's Knowledge Map

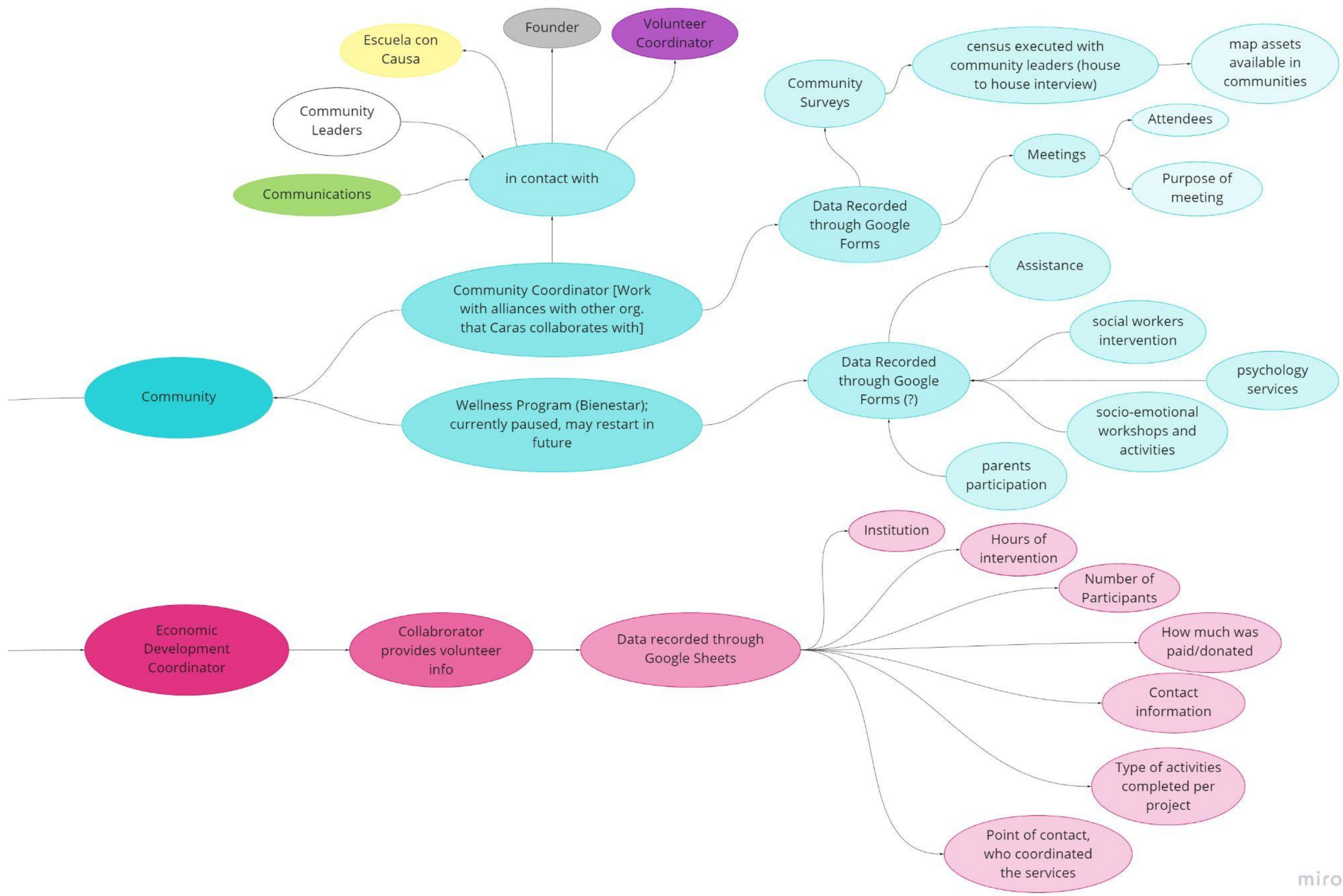
G1: Main Employee Map



G2: Urban Roots

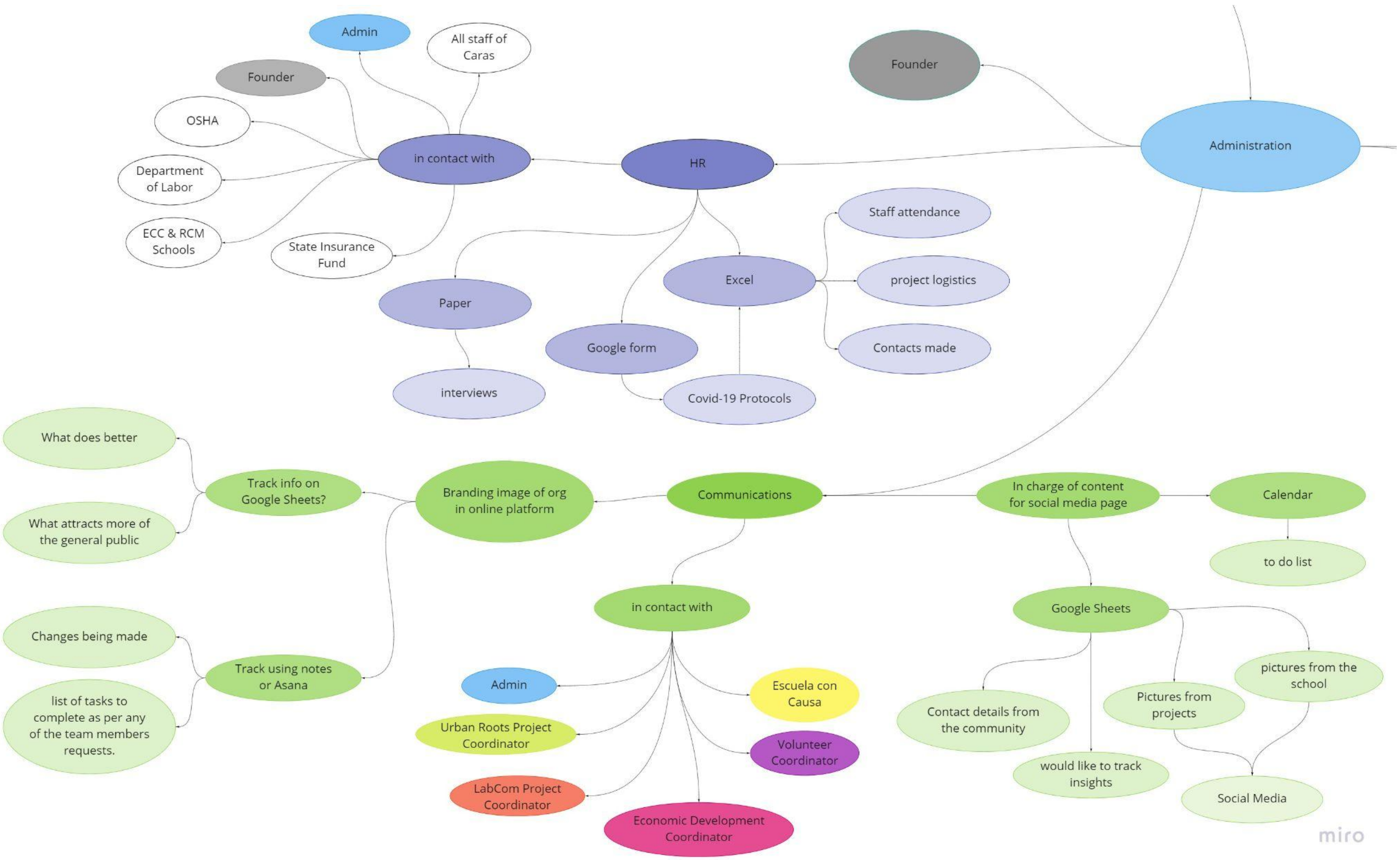


G3: Community and Economic Development

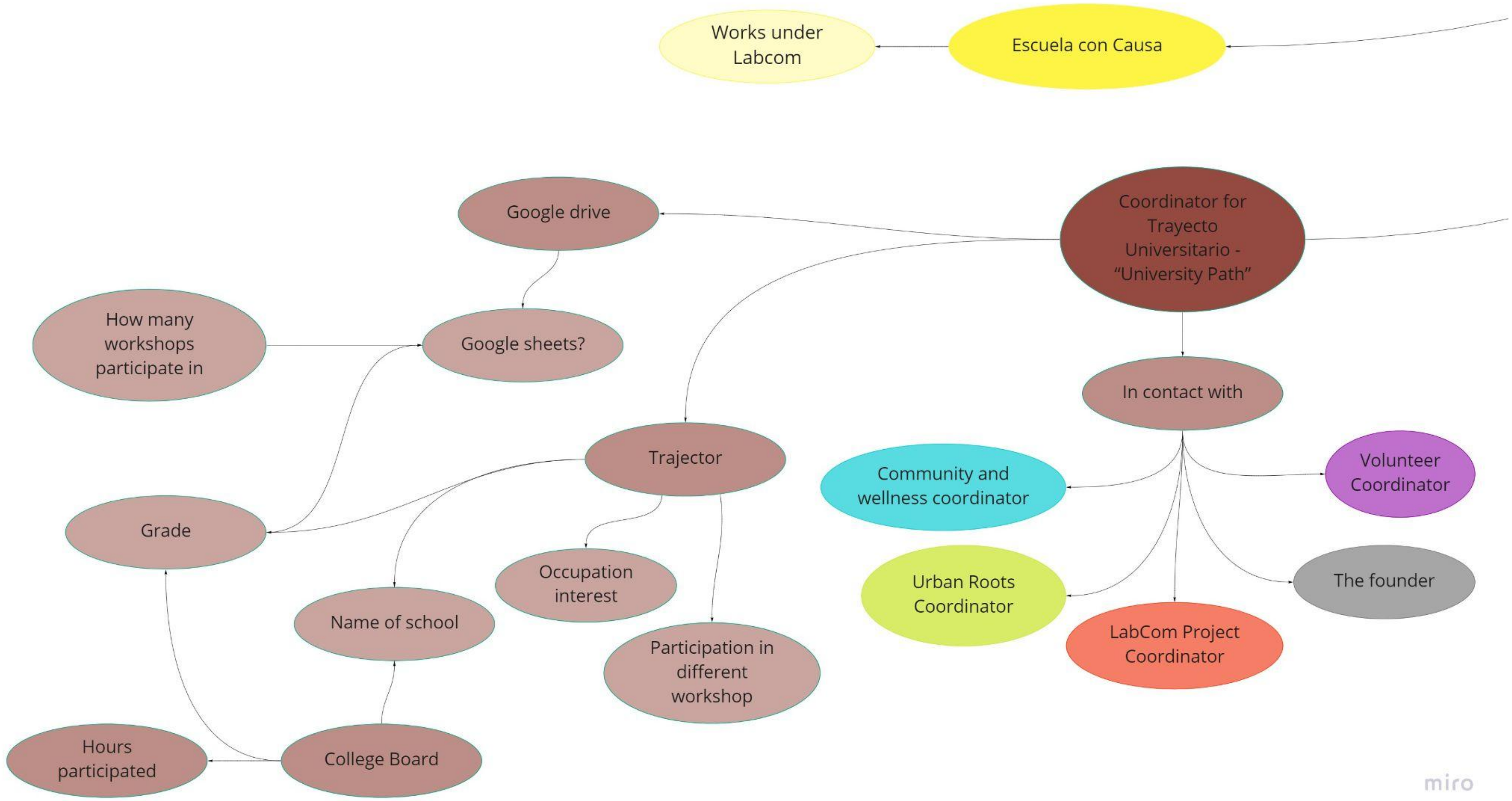


G4: Administrators Part 1

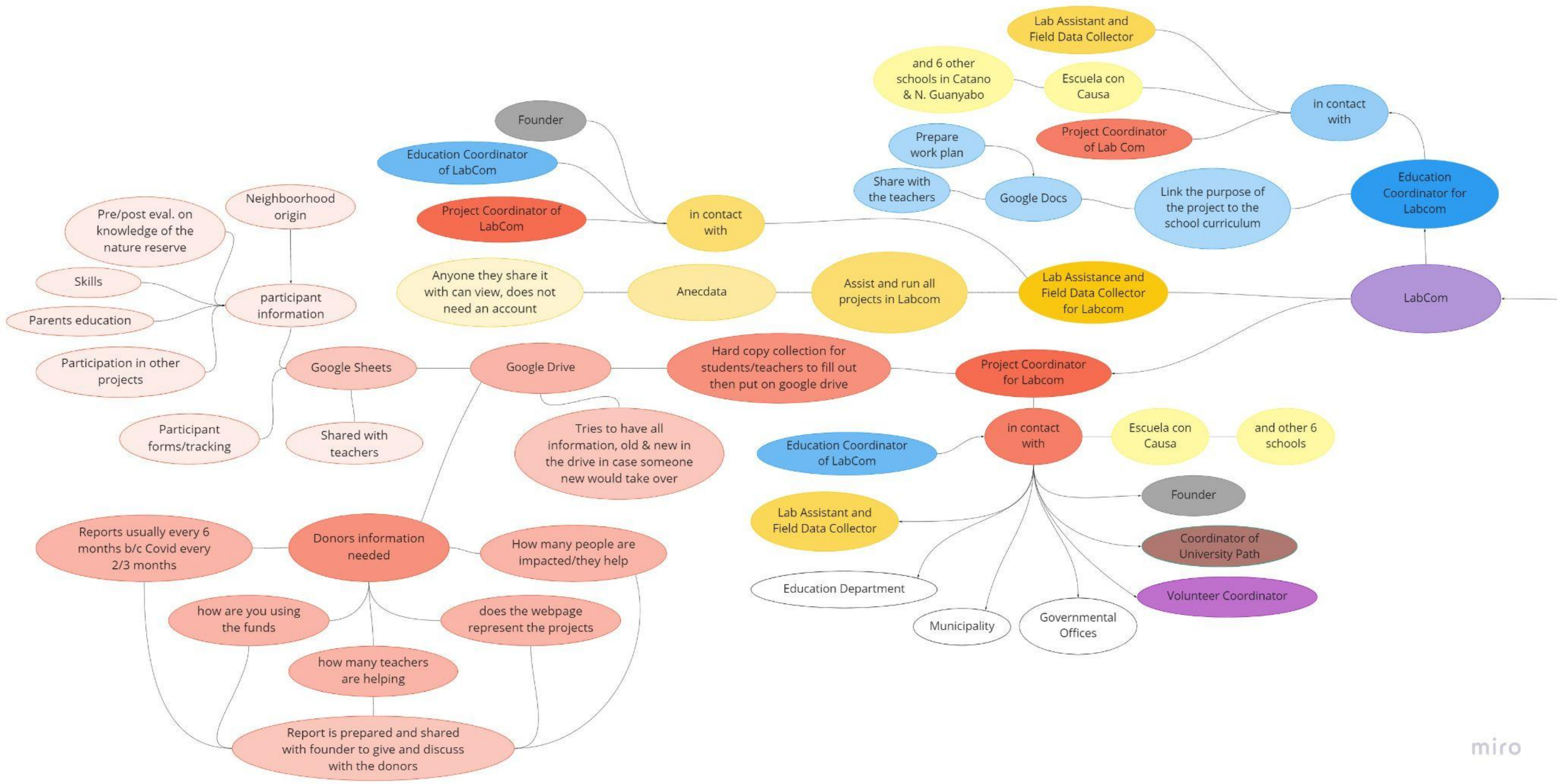
G5: Administrators Part 2



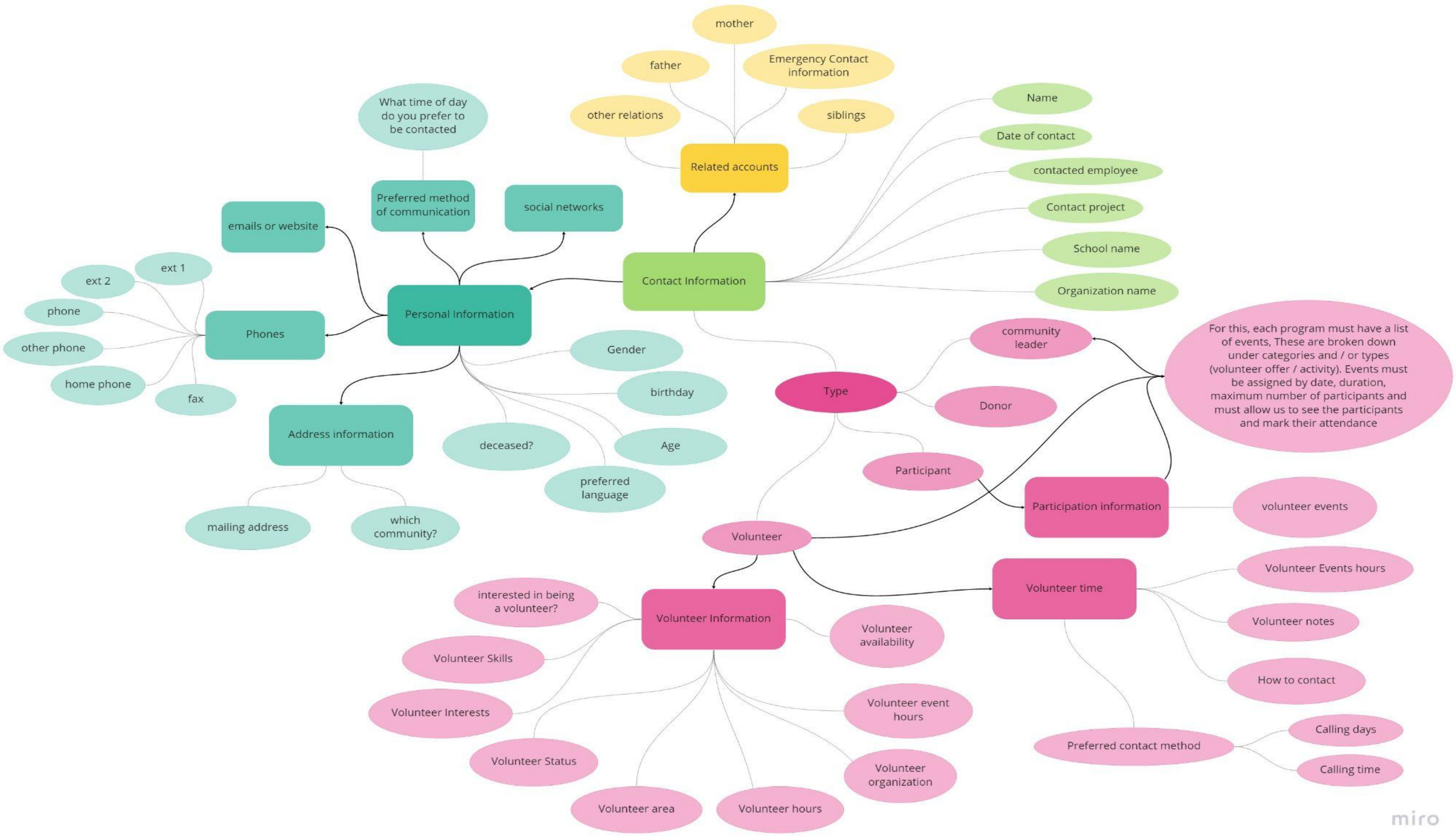
G6: Escuela con Causa and Trayecto Universitario



G7: LabCom


Lab Assistant and Field Data Collector
and 6 other schools in Catano & N. Guanyabo
Escuela con Causa
in contact with
Project Coordinator of Lab Com
Prepare work plan
Share with the teachers
Google Docs
Link the purpose of the project to the school curriculum
Education Coordinator for Labcom
Founder
Education Coordinator of LabCom
Project Coordinator of LabCom
in contact with
Neighboorhood origin
Pre/post eval. on knowledge of the nature reserve
Skills
Parents education
participant information
Participation in other projects
Participant forms/tracking
Anyone they share it with can view, does not need an account
Anecdata
Assist and run all projects in Labcom
Lab Assistance and Field Data Collector for Labcom
LabCom
Google Sheets
Google Drive
Hard copy collection for students/teachers to fill out then put on google drive
Project Coordinator for Labcom
Shared with teachers
Tries to have all information, old & new in the drive in case someone new would take over
in contact with
Escuela con Causa
and other 6 schools
Education Coordinator of LabCom
Founder
Lab Assistant and Field Data Collector
Coordinator of University Path
Volunteer Coordinator
Education Department
Municipality
Governmental Offices
Reports usually every 6 months b/c Covid every 2/3 months
Donors information needed
How many people are impacted/they help
how are you using the funds
does the webpage represent the projects
how many teachers are helping
Report is prepared and shared with founder to give and discuss with the donors
miro

H. Focus Group Findings: Caras con Causa Contact Information Knowledge Map



I. Contact Information Excel Sheet

I1: General Contact Information Part 1

Date	location of Event	type	name	date of birth	age	e-mail	gender	region/ nationality	preferred language	current level of education	occupation	community	contact method preference	mailing address	home phone number	cell phone	other phone
04/01/2021	Cataño	volunteer															
04/01/2021	Cataño	participant															
04/02/2021	Guaynabo	donor															
04/02/2021	Guaynabo	collaborator groups															
04/03/2021	Cataño	community leaders															
04/03/2021	Guaynabo	community members															

I2: General Contact Information Part 2

ext 1	ext 2	fax	contact reoccurance	website	social media	project	school	school year	organization	siblings	mother	Mother's highest level of education	father	Father's highest level of education	emergency contact name	emergency contact relation	emergency contact phone number

I3: Additional Contact Information for Volunteers

volunteer type	paid or unpaid	monetary value of unpaid	Volunteer skills	volunteer interests	volunteer status	volunteer area	volunteer organization	volunteer hours	volunteer availability	volunteer interest in unpaid internship at Caras	volunteer calling days	volunteer calling time	volunteer notes	volunteering count	non-local volunteer residence	platform used to find resident

I4: Additional Contact Information for Participants

Participant interests before involement in projects	Participant interest after involvements	Date of calling participant	duration of calling participant	Participant's preferred method of contact	participation count	does participant participate in internship	participant standardized test grades	participant admissions	school's overall grade before participation	school's overall grade after participation	participant scholarships	did participant graduate?

I5: Additional Contact Information for Donors, Collaborator Groups, and Community Leaders

donation types	amount of donation	project or activity donated to	reason/interest for donation	donation reoccurnace	times donor has been contacted	meetings with collaborators	roles of the collaborators	reason for meeting	number of people in the meeting	number of meetings with community leaders	number of people in these meetings

I6: Additional Contact Information for Community Members

number of surveys	community members needs-type	community members needs-amount	community members needs-amount satisfied	community members needs-amount left	number of community members satisfied	number of community members not satified	reason for dissatisfaction	community member's professional services	community member's professional services reoccurance	community member's income	community member's satisfaction(yes /no)

J. Focus Group 1 Transcript

Interviewer 1:

Before we start, we're gonna read a consent letter, because we need your consent and permission to ask you questions. This is a participation that you can withdraw at any point, if you feel uncomfortable.

"The Consent letter below will be presented to each member that is involved with the preferred methods we will use to perform our objectives. We are a group of students from Worcester Polytechnic Institute in Massachusetts. We are conducting a focus group data collection of the nonprofit organization to learn more about the current and ideal means of communication. This research will be used by us and Caras con Causa to improve the organization's internal communication. Your participation in this focus group/comparative research/qualitative data collection is completely voluntary and you may withdraw at any time. Please remember that your answers will remain anonymous until we receive your consent to share it. No names or identifying information will appear on the questionnaires or in any of the project reports or publications without your consent. This is a collaborative project between the nonprofit organization Caras con Causa and WPI, and your participation is greatly appreciated."

So is everybody okay with us starting?

Everyone shaking their head yes, thumbs up or verbally saying yes

Interviewer 1:

We first want to get to know a little bit about everyone and what your specific role in the organization is. If you guys wanted to go one at a time

Participant 1:

I guess I can get started. So my role is as a volunteer coordinator and technically an economic development coordinator. I mostly work with volunteers from the US though ehhh so any type of like service learning or paid volunteer service is kind of what I coordinate and supervise with the volunteers in field. And I work with for example Participant 6 to coordinate with community leaders and check what the needs are in the communities that we can attend with those volunteers and I also work with each of the project coordinators like Participant 2, Participant 4…..and anyone from the tutoring centers to see also if they need any type of help so we can just connect them to any volunteers that they need ans In terms of economic development that is something that is kind of recent the reason I was given that title is because I work with paid experiences from volunteers so if we have like corporate groups that come or conferences or ummm student groups from US schools or universities they include a community donation for any type of experience that they're looking for ummm so we use those funds that come in to reinvest into the projects of the organization so thats part of the economic development but also through these experiences we recruit people from the communities to provide services like lunch, tours, things like that so they also receive compensation for those services that they provide. Anyone else want to go?

Participant 2:

Hi good morning to everyone. My name is Participant 2 Rosado and I am the project coordinator for the lab com I hope that you already know the lab com because we have met before but as you already know its a laboratory and community lab that is used for an environmental and sciencey project that are work with the seven schools in Catano and Gyanobo Gyuanobo who solves environmental problems that we have in our area and our communities

Participant 3:

Morning! So my name is Participant 3 Herman and I am the coordinator for Trajecto Universitario, it is a college access program for students from 6th grade to 12th grade

Participant 4:

Hi good morning everyone, nice to meet you all. My name is Participant 4, I am the project coordinator for Urban Roots. Basically what we are doing is trying to reforest, create pollination gardens in the school ……….. And throughout the communities that Caras serves in Catano and the North part of Gyuanobo

Participant 5:

Good morning everyone, my name is Participant 5. I work with the Lab com as the education coordinator so my job is technically to link the purpose of our projects with the school curriculum so yeah

Participant 6:

So I am Participant 6, I am the community coordinator and I work with community organizing and leadership and I also work with like alliances with other organizations that we collaborate with

Participant 6:

Hi my name is Participant 6 I am a lab assistant/field data collector working primarily with Lab com. Participant 2 already mentioned a lot of the projects we work on so I basically help assist and run the project involved in Lab comm, primarily working Participant 2 and Participant 5

Interviewer 1:

Awesome, thank you so much! So the next little thing we are looking at is, since you are all involved in a bit of different projects, we were wondering who you communicate with on a daily basis ? and who you are sharing your information with, if you collect any, so who you are sharing that with either within people on the project you are working with or everyone in the organization

Participant 1:

So in my case, with volunteers the information that I record is pretty basic so I mostly share that with anyone that is filling out a grant for example and they are wondering how many volunteers came into the organization in the previous year then I'll share that information with them so that can be anyone in the organization but mostly I share the information with Participant 8, who is the director of the organization and I share it with Edgardo who is in charge of finances as well because we have those donations coming in from those volunteer groups and we have to record how many donations are coming in and what they are being used for so I often communicate with him.

Interviewer 1:

So are you Participant 1, are you in charge of documents and just documenting all that and sharing that with those other people that you just talked about?

Participant 1:

Right so I'll share whatever volunteers I've interacted with and supervised and coordinate with throughout the year but their are local volunteers who can contact directly each project coordinator and those volunteers will be reported under their individual projects and not under my report

Interviewer 2:

I think it'd be fun if when someone talks when they are done, they can tag someone else

Participant 2:

Ok, are you hearing me? Yes. well in Lab com our communication is using a principle, gmail, email and we use our gmail platform, the whole platform, the forms, excel docs and word docs and basically, we have, each one of us has, when I mention each one of us I mean Participant 5 Participant 6 and me and Participant 4, we have each one of our mail but Lab com I asked for a mail that is just for Lab com, nobody's Lab com, we all are Lab com. And we use that account to storage all the important information that is from the project and in there, we manage all the papers, forms, data collection, all the information of all the participants that we have received and all the data of the different projects in which we are working, so each one of us has access to all these papers and when we want to share with somebody else we just add them to the document. Ok, so in this way if Participant 8 wants something he can go there and have easy access to what he is looking for. In some cases he doesn't know how to find things, so he asks for us, hey give me that , but usually he, or any of us can go there and have access to the information that we already have. In Lab com when i arrive, I decided that I wanted to make an account or just the project because in the past, different people were working on different things and when the left the organization, we lost all the documentation so I want to be sure that anyone of us is not going to be working on the project that any work that anyone of us has done in the past was storished and can be worth by whoever came after us so this is how our main communication method and I don't know if we want to add Participant 6 that we use a lot of Whats APp for a lot of the daily use but for the principle documents we have everything storished in google docs and we are able to share them with the teachers and with the students that we received. In some cases we have to/have been thinking to use the same method with students and teachers because but to share the digital documents its not so easy because they might not know how to use it or the student doesn't know how to complete the form, or does not have the tools to do it so when we work with the communities, the teachers and the school, we need to go to the hardcopy and then we pass everything to the digital forms. Is that right Participant 6, Participant 5? I don't know if I missed something. (Thumbs up from Participant 5)

Participant 6:

I don't know maybe Anecdata is a way we also share data with the public

Participant 2:

Yes, exactly we have, each one of the projects that we already have has a database platform. We can use Anecdata, a webpage that we used to publish all the data that we already have but it's another program in which we storeish everything, and it's secure.

Interviewer 2:

Just a follow up question, Participant 2 do you feel like your team talks to other teams when your projects might overlap? For example do you feel like you might sometimes be communicating with someone in the community team or someone in another team sometimes on a daily basis

Participant 2:

Yes for sure. We are working on Lab com but we are all the time making other works with Anecdata Participant 6 Participant 3, It doesn't matter that we are in Lab comm, we are always having the communication. Like simply right now we are going to be working with the school so we need to have communication with the people of the school, the teachers and be receiving the students Participant 3 is sending to us to make some green hours that they need, so I need to coordinate that with Participant 3 she's going to be working in a document that I sent to her sot she can make the reservation for each one of the students so I can see it and communicate with them so it doesn't matter that we are in lab comm we are always working with the whole group

Interviewer 2:

When your projects are overlapping, cuz you just said each project has its own for example drive or group when things are overlapping where do you store that data, for example if you're coordinating it does it go in the Lab com section or does it have like separate folders for where things overlap.

Participant 2:

Participant 1 and the rest of the group if you want to add something it is welcome but right now, if one of us has a gmail account, it is under a big account that is from Caras and we can share all the documents. It doesn't matter that we have different storeish, we can access to different files that we have under the Caras account so we can share them and work in the same document sometimes if I create them I am the owner by for example right now if I sent out a document to make the reservation for the students that will receive the ….between Participant 3 and me, we are working on it. She will be looking for the students who are working and aid? And she will be using it to have an accountivity? How many students….something day? And I think she should have, Participant 3 you can correct me but I think she has another document in which she has all the hours in which they are working on. But at the same time I use it to take information on it that I need and I have my other doc in which I have all the metrics of my project. WE usually have a common doc to work together but we have our formal metric for each one of our projects. Was that clear? Participant 3 are you alright with that? Are you doing the same?

Participant 3:

In projecto we use google drive to manage all the information so students that participate in the college board reviews that we have a table to register the assistance and the students that are working in a project with Participant 4 and now with Participant 2 for momentary we have another table or form that we reduce their, all the students that are participating in the hours that they give to each of the projects. So more or less the same system but whenever Participant 8 needs the information it goes direct to him and then if we're working together like now with Participant 4 and Participant 2 so we communicate with each other all the information. Participant 4 gives me the assistance and she tells me how many students are participating in the workshops on Thursdays so I reduce that information but she also has her way of reducing the information in her system

Interviewer 1:

I just want to see if I'm understanding this correctly because I know Participant 2 and Participant 1 you have talked about how Caras has an issue or a concern about double tracking people, or counting them, so it seems like to me right now, you have a lot of students with the Lab com things and ones that work with Participant 4. Are these some of the same students you are struggling with double counting?

Participant 3:

they May be the same students but not necessarily so a student can be working with Participant 2, Participant 4 or me but not necessarily all are doing the same thing.

Yasaman:

Just to clarify something, so if I'm understanding correctly. You don't have one main folder for Caras con Causa where there are different folders for different projects and each of you instead have your own folder and whenever someone else needs that information you share that with them (heads shaking yes) ok

Participant 1:

Participant 4, Participant 6, maybe one of you can go next?

Participant 6:

Yes so basically my main communication, it changes based off of the project I'm working with at the moment. I mainly communicate with Participant 8 like Participant 2 anyone said we share the information with him. I have my own folder and I share it with him but like right now were working on a project that involves the communications person of the organization and what we did was for that specific event, we created a shared folder in drive where anything relating to that is stored in that folder that everyone involved has access to so it's not like, its like not my drive specifically, its a shared drive in google so that's like pertaining to that event only so once we finish that event that's just going to stay there. So next year when we do that event and have to get ready, that's all organized there but I also communicate with people outside the organization, with organizations that we have alliances with and it's mainly either by email, most of them use the same method that they have google drive so we share documents in that way and if there is a specific document that we're both working on i'll share it with them but i'll still be the owner. We also use like microsoft telephone or Whats App we use that alot like for informal stuff, like not necessarily like meeting but like to touch base and such so i think that's a pretty resumed version because Participant 2 and Participant 3 mostly said everything. It depends on what event I'm working on because sometimes I have to communicate with Participant 3 like if I need students or like Participant 2 Lab com is working with a public housing project so I'll collaborate with that so I'm like rotating around a lot with who I communicate, it changes daily.

Participant 4 :

Tell me. So basically I'm the same as everybody. It depends on the day I mostly communicate with Participant 5 Participant 2 and Participant 7 because of the Lab com, the projects, the ecological projects, also with Participant 3 for the green contact hour that the students need to do during the school and with Participant 8 and Participant 9, because the other coordinator for the crisis Irvana, but he's working right now, making some stuff for tomorrow activity so it depends on the day. I basically communicate with everybody if they, and the information that's the same as everybody else, I put it all in the Google drive and I can share it with everybody. And that's how they can see all the information that I gathered. Yeah.

Interviewer 1:

So you've seen a little bit of like the Lab com storage sheets and everything. I know Participant 2 you kinda mentioned that not everyone does that, but that's like the guideline of what you want. So for like urban roots or any of the other projects, what are you guys currently collecting from the students or participants and how are you starting that? Are you using a spreadsheet at all, or just hard copies or anything like that?

Participant 3:

So in Trajecto this year has been a little different since we don't have access to all the schools and the oldest students look basically the information that we usually collect is just the name of the school, the grade that they're in their interests, occupational interest and so on. So not very much information and, and their participation in the different workshops and activities that we do in the schools. So I have a Google, like an Excel sheet, a Google sheet that we reduced her, like the first, the year that they started in Trajecto Univeritario. So if it was sixth grade or seventh grade, and how many workshops do they participate in? So that's what, how we did it last year and in the well, college board reviews the same way what school are you from? What grade are you in? And, and how hours do that, do you participate from the Means

Interviewer 1:

Participant 4 how do you collect any information? Cause I know different from lab com and the projecto universidad.

Participant 4:

Yeah. So basically I, I use the Excel spreadsheet. Right now we're collecting information on how many plants we are terminating the nursery, if they, how many are dying and we'd be, if they, the donations also we gather that information and like the species that we are planting the land is going to help tomorrow that part in the students and with this contact, the green contact hour I use a, like a Google form that they need to, the students need to like, just like fill out, fill out if they, and I asked them their name, their age, their grade. And what are their interests and why they want to participate in the program. Yeah, I think that's it.

Interviewer 2:

Participant 6 How about you? How do you track stuff? What do you track?

Participant 6:

Yeah, so right now I don't really have participants like anything I use, I mainly have like meetings with community leadership, which we've known like a long time, so I don't really track like their personal information. When we did, like, before COVID, when we were doing more open community meetings, we would like have assistance sheets basically. So we would track like their like, contact information mostly, like, because they were like workshops or anything. And and like with like the meeting, how I track my meetings with like different organizations or different people, I basically like created a Google form that I can fill out. And it tracks like who I met with like what organization they were, what was the point of the meeting? And it's just like a way for me to like, keep track of all, like, who Am I like if I have a community leadership meeting or within another organization, that's basically what, what I'm tracking right now.

Participant 1:

Yeah. I I wanted to say that I kind of do the same as Participant 6, because most of my projects have kind of moved virtually because we're not receiving volunteers in field since COVID started. And a lot of what I document is what institution they're from, what type, the, like the hour of each intervention that we have, or each meeting or online, like virtual service that we have a, how many participants and what type of tasks or things were done in those activities or interventions. But also I work with like a collaborator of ours. That's called [Amizade], that's an organization that specializes in service learning, and they're the ones who connect us with the university groups or high school groups to work with and they provide participant lists. So I get that demographic information from them. So I don't have to acquire it myself.

Interviewer 1:

Can you repeat the name of that organization you said?

Participant 1 :

Yeah, I'll write it in the chat. Cause it's kind of weird.

Interviewer 1:

Ok thanks. Yeah. Participant 7 and Participant 5 do you have anything to add, cause I know you mostly work on projects like with Participant 2, anyone else that's kind of been done, some major talking,

Participant 5:

I just want to add that. Even we have a even every project has his own sheet for documenting the different things are we have weekly staff meeting. So we talk about everything we, we have done or we have documented, and maybe we can avoid some overlapping information sometimes.

Participant 7:

And I guess one last thing that about our projects is, is but I mentioned anecdata is in addition to, you know, this being kind of like this online platform where we are able to post all our data and, and, you know, it's kind of another place we use to store data. In addition to all the spreadsheets we have in our Google accounts and the Lab com Google account it's also a way we can share the data with the public because it is a publicly accessible database. Anyone can go to the webpage and, you know, look at the project, see the description, see what parameters and metrics we use for each project and see the data themselves. They don't even need an account. So it's another way to share data.

Participant 2:

I want to add that in, in our, in our project in lab com, sometimes we are working well, we are working always together, but sometimes we have different t-shirts different groups, so we need to split up eh, maybe can be working in the lab. One is having a meeting with some Fisher and I am attending a group right now in a visual way. So we create a form that is our that we need to feel that to complete each time that we finished an activity that we want to record, that is important, important for the project. So, eh, is, is like a, how do you say, Speaking Spanish (response from another participant) Thank you. Thank you. You said diary. So diary of all our work, it doesn't matter. That is an activity that we are doing without a volunteers or participants, eh, and record everything meetings, a beautiful activity activities that are going in that are a, how have been with volunteers or participants. So we have a diary and it helps us to have an idea and have a, a complete, eh, report of what we are doing. And we have a categorize them by different types. So if we need information information about how many times do you have meeting with your teachers? Well, we can have them number. How many activities did you, eh, do, eh, by yourself without anyone? So we can have the number a and with that diary, we also work well, the reports that we need to do each week for the whole organization, and in some way, I don't know, oneParticipant 5 and Participant 7 what I feel that, that this is, this is good, but because we don't lose any kind of information, sometime we are working really fast. We can be attending two groups in a day and you would also document, eh, what we are doing. We can forget it. So this kind of tool help us to track everything that we do. And then if we doesn't have the opportunity to do the metrics in the day that it was supposed, I can go back and I can maybe have the reports of three weeks because I have this diary. And then in there, I collect all the information of the people that we received, the t-shirts, what we were doing, how many people, and it's very easy to complete. We can do it in the same field from the phones. If I am in my computer computer, eh, I can still very fast. And in that way, we don't lose any information of what we have been doing. It doesn't matter if we are together or apart working in our homes or in the field or wherever we are,

Interviewer 1:

So this next one is kind of I think mostly for Participant 3, we're also kind of wondering about every single project group. I know you, since you were working with the different students throughout the course of the time and seeing like how many workshops or anything like that, they participate in like each year, like from sixth to seventh to eighth or anything like that, do you, sI know like you're keeping track of it in like an Excel sheet or something, but I use possibly like making like a chart or like a visual map in order to see like how many they've participated over the many years. And it's more of like a visual thing that you can see, like, Oh, they, they participated in two this year, but now they participated in like five this year that you can see like the drastic changes.

Participant 3:

So, no, not yet. We're not doing that right now. We last year, so last year they was the second year for Trajecto Universitario that we have access to, to the students. So that's why we started like with the sheet to keep track of them. And we classify them by graduating class. So we have students since the grade changes each year. So we route them by each school and each graduating class. And we started tracking how many workshops and activities they participate from, but not in a chart yet.

Interviewer 1:

Yeah. Is it something you'd like to see happen or be charted?

Participant 3:

Sure. we did like the chart. We do it with the the reviews, the college board reviews, so that we can track how many students we have for, from, from our school, like La Rosalina that's our school. And then how many students we have from the [inaudible], which is another school and how many students we have from private school. So That's,uwe always, at the end of the reveals, we, we take, make a chart of that. And also for,uthe college fair. So how many students from 12th grade or 11th grade, or we also,ukeep that in a chart and how many,upeople from the community went to a,ucollege fair. So that type of information we do,uhave,ua table or know about, or a graph, but not for the workshops though.

Interviewer 1:

So then the next question kind of has a lot to do with your donors or anyone that is giving you money. How are you keeping track? Like, I think a lot of you mentioned it a bit that you're like tracking it in your spreadsheets, but how are you keeping track of that? And do you then share the information you collect from your projects and like your students or your participants, do you then share that with your donors as well? Or do you do something different to share with them?

Participant 3:

Okay, so right now I don't have like for Trajecto, I don't know the rest of the projects, but for Projecto, we did have a donor that was college board. And then we did like at the end of the year, an annual report that we provided to them with how many students were impacted, how many workshops we give and all the activities that we did throughout the year, that was our only donor that year. So that was just what we need, like in the annual report for the specific donor.

Participant 1:

I think lab com and urban roots are two other projects that deal directly with donors.

Participant 2:

Okay. Well, in lab com case what our donors need to prepare a report every six months, right now, with the pandemic issue, we have been doing reports maybe like two, every three months, but we basically basically asked, eh, for the, how many people we impact. It depends in which are the mainly purpose of the donor. Okay. Because maybe one of the donors can be donating for infrastructures. Another one can be donating for, eh, for the students. So, eh, eh, depending on what they have been donating, they will be asking us for that specific information. But basically each one, all the information that we gathered can be used to complete the forms or the reports. I'm sorry. So they can be just asking for, Hey, how the, the, this, how many students have you impacting? How many teachers are working on a, are you or your web page a already prepare? It is reflecting all their five projects, scientific projects. They also are asked for how we are using our, the money or the phones for the two to complete the facilities that we are going to be using with their students. So, eh, lab can have different funds for different areas. And depending on which is the main purpose of the funds, we need to give them the information that they ask

Interviewer 1:

Do you communicate them with the donors through emails that you share these documents or, is that like, if you have a zoom call or something like that with them,

Participant 2:

Sometimes, sometime we have some calls, the principle, eh, eh, communication method is email. And it's basically with Participant 8 and then Participant 8 share, or have meeting with, with the rest of the team and we prepare their report or whatever he needs for the, for the next meeting that we, that he will have. But eh, is basically to mail.

Interviewer 1:

Is that very similar to what you shared? Participant 4?

Participant 4:

Almost the same as Participant 2. It depends. I shared information depending on what Participant 8, one asked to write a report is usually how many students you are impacting, what communities, how many trees you planted, stuff like that. I don't specifically do meetings with the donor. That's mostly is Participant 8 except for US fish and wildlife, which we have a grant this year in June. Yes.

Interviewer 1:

So even though all of you are kind of collecting like the project data, anything to share with the donors. It's usually just Participant 8 that talks to them and shares with them. Yes,

Participant 2:

Yes. I want to add that. Eh, when we started the project, he just, eh, the mainly, eh, objective of the project, eh, in our case, we doesn't know how many, how, how, how much is the budget. He just can tell us an average and we can start doing the project and we present everything to him and he approved it. So we can go on in, in each one of the project. But eh, we start to work. We may, as well as in the lab com case we prefer our, eh, forms to gather the information I don't know if if that is whatever it is, if that is what they want or what information I should be gathering. So I collect everything when I start, eh, work in the projects so we can use a, whatever we need to report to. It doesn't matter which, which will be the, the, the donator. Okay. So this is the way We do it in the Lab com and as you can see with Participant 4 too.

Interviewer 2:

Um just one question, has any of you has ever had an issue with a donor wanting a certain type of information that you haven't been collecting?

Participant 1:

I mean, I can speak a little bit broadly on the experience, not directly through my projects, because my projects don't really have specific donors. Eh, but like from experience in the past, I know that the organization has wanted to apply for certain grants that are for a specific demographic group. And we don't always have the specific information of how many we impact in that demographic group. It's been getting better. I think in the last year and a half, eh, previously we have had that type of difficulty.

Interviewer 1:

Um I guess this one's a little more directed towards you Participant 1 since you deal a lot with volunteers. What do you share information with them when, you know, you have like upcoming activities or anything like that like what are you sharing with them about either projects that are coming up or anything like that? Do you guys have pamphlets or just little information sheets about your projects?

Participant 1:

I do. I have information sheet, an information sheet with a brief summary of each project in which we can receive volunteers, but usually along with that, I'll communicate with each project coordinator and see what upcoming activities they have in their calendar in which they would need volunteers. And eh, once I start coordinating with the volunteers, I let them know exactly which activities are available for volunteers in the date that they're asking So it's, it's a constant communication.

Interviewer 1 :

So since we've talked about Google drives and that's what you will use to track your data, what are your guys likes and dislikes about your current, like how you're sharing your data or how you're collecting it?

Participant 3:

So what I like about Google drive it's that it's easy to share with the rest of the group if any other project needs any information about what we're doing direct. Also, we just share it with the email and that's it. And also sometimes I need information that Participant 2 has and she sends me an email and that's it, or give me access to the documents. So that's really what I like about using Google drive that anyone can have easy access to the information.

Interviewer 1 :

Is there anything that you dislike about it or struggle when using it? (Participant 3 shakes head no)

Participant 1:

Eh, I think for me is the amount of documents that we have access to. So like, it's not how can I explain,

Interviewer 1:

I think a better way to organize where all these documents are coming from?

Participant 1:

Yeah, because we have different documents and reports for different things. We can't always compel them into just one easy to access documents that we used to share a lot of documents constantly. And sometimes it's kind of a hassle to be searching for each one when you need that information.

Interviewer 1:

Is that kind of the consensus that it's just easy to use for the most part and share with everyone,(heads shake yes) ok. In terms of, at least since no one else really had any dislikes, Participant 1, how would you like the information to be stored better to help it be more organized when you've received all these documents?

Participant 1:

I'm not quite sure, but I think if Participant 2 has mentioned that Participant 8 has mentioned before, eh, it's kind of having like a base format that everyone can use uniformly throughout all of the projects for like very basic and specific information that I think we all need to access at some point throughout our project like participant information hours eh, and what Projects are participating in, pero for the rest, more of more detailed information. Like, I'm not sure how that could be done better, at least like that base information, I think would just, of course be easier to have a single document where everyone is just filling into it.

Interviewer 1:

I'm sorry, you just said like one big document. You're thinking of that everyone just edits.

Participant 1:

Yeah. I don't know if that's the best way, but like having one, one platform or one like one document, I don't know, one folder where everyone can just fill in that basic information.

Interviewer 1:

Right. No, that makes sense. Okay. I think group, did you guys have any other questions?

Interviewer 3:

I had one actually. Do you guys think you spend a lot of time, like emailing each other back and forth for like like the links to these documents? Or is it like pretty quick?

Participant 3:

My experience where you just pretty quick, I just call Participant 2 and I say, I need so-and-so information. And she sends me the email or the link that safe. And I say, Participant 2 because it's mostly the one that I ask for information, but I'm sure with any other of the other projects will be the same.

Participant 2:

Yes. I want to add that. I see one dimension. I think that we use the correct use for Google drive. We share the information very fast. We can ask for it to be a call or WhatsApp, and it's very easy to use with our team. And if we are working with people, I will say outside of Caras it gives us a the opportunity to share the document or with certain or a specific, eh, probation you can read and you can view, or you can comment. So for us, it's good because we are working at least in lab com with, with people from different universities and sometimes they need to view our data a, so it gave us that opportunity. Some other, other maybe mail servers doesn't allow that and gmail allows. It was a, I don't know if we can maybe talking about what Participant 1 is telling that we have a lot of documents. I don't know if we should consider to have just one server, eh, the whole world of documents that we already have, and we can, eh, maybe give permissions in the, in the, in the server to the people who is working in the specific projects, but maybe it can be eh, it doesn't resolve the problem. That is not a problem, but, eh, eh, duplicating all the, the, the documents that we already have because, eh, I have documents in my file. Maybe Participant 5 have the same in their file to have easy access, eh, or maybe we create a groups and we have a access to the same, eh, documents. And we have been doing that to resolve the problem that we have the same paper or document in different places. Eh, what, I don't know, I, I should consider to have just one server in which they whole team can storeish, everything in there. So, eh, it, it has, it can create a storage of whatever we have been doing through the different years, because right now, if we look for the past and we can have information from our projects in the past, we doesn't have that. So maybe these can be good and should we consider, so if someday, even it's not going to be working more in Projecto and Trajecto Universitario and she's working in another project, the next person who will be working in the same project can, can do, or can use the same documents or can study what she was doing in the past and not doing, not, not do it again. I don't know if you understand me.

Interviewer 1:

I think, I think I understand you're saying like, just so she doesn't do the same document that you already started collecting information.

Participant 2:

Yes. I think that right now, when we start to, when we started the project, we create everything for that project. Right. Great. Maybe that project has been going before I can study the papers and recreate them, or maybe modified and working in a continuous way on you have a track of the project through time

Interviewer 1:

I also kept hearing, you mention that you use WhatsApp a lot. You used to, I know you mentioned for informal communication, is that like a platform that the whole organization uses just for a quick reach out to someone to not have to send an email or something else that you use it for?

Participant 2:

Well, usually we use for everything I think. Right?

Participant 6:

Yeah. I think it's basically like when we need to touch base with anybody, like, it's like, it's a sensor, it's our personal phones also. Like, so we would use it to like communicate something quickly or like also, like we do speak about personal. Like we are like out of like, out of work hours. Like we do speak through that platform also. So yeah, but it's basic like, it's basically when we need to like speak about something quickly.

Interviewer 1:

Yeah. That makes sense. That's kind of what I was thinking, but I wasn't sure if maybe you guys like an organization, like, cause I know a lot of platforms like that people use like group chats, even for like a quick communication. Like, I dunno, like your team has a meeting or something like that. Or if you used email for that instead

Participant 6:

We have a group chat of like the like the coordinators in the organization where like, if like sometimes our sendings aren't working, like they would send it through there or they send like announcements through there also through like that specific group chat. But also if you need to like contact each other, one-on-one one we'll do like personal.

Interviewer 1:

That makes sense. Yeah.

Interviewer 2:

I had kind of a very open question basically. Do you guys feel like your current method of tracking information is sufficient? Is it good or do you guys feel like you could make some changes to the current method, make it better or Do you guys feel like you would need a whole new system?

Participant 3:

So I think it could be better. The definitely because sometimes the same students that participate in some workshops in Trajecto also participate with Participant 5, Participant 2 and Participant 7 on other activities or they participate with Participant 4. And so or they do volunteer work with Participant 6 and Participant 1 so yes. We need to like center the information so that we can track that one student through all the projects. So maybe that's something that we should work with so that we can keep track of that same student that, and at the end of his when he graduates, we can see all this student was in the tutoring and he also was in participate in lab com and he did volunteer work and then yeah, he participating in the reviews for the college board and all these workshops and, and keep track of that students and any participation through the projects in Caras

Participant 1:

I agree. I think we've gotten really good at like in our individual projects, like documenting what we're doing and who we're impacting in the short term, but I think in the longer term and that like an organizational level, what that impact is, it's kind of hard to visualize and understand.

Participant 6:

Yeah, I agree. I think like we need just to find a better way to standardize everything, because we don't usually do it the same way because we all came up with our, with the systems that work best for each other and for our better our projects, which maybe like don't translate across. So it just needs to like be updated and a little bit standardized and like an all be sure like everybody's in the same page.

Interviewer 1:

Unless my team had any other questions. Thank you for your time. And the information you all shared with us is very helpful.

Participant 1:

So thank you for taking the time for this focus group and for everyone from Caras batteries. Thank you for being here.

Interviewer 1:

Okay. Thanks. Have a good day.

K. Focus Group 2 Transcript

Interviewer 1:

Before we start, we're gonna read a consent letter, because we need your consent and permission to ask you questions. This is a participation that you can withdraw at any point, if you feel uncomfortable.

“The Consent letter below will be presented to each member that is involved with the preferred methods we will use to perform our objectives. We are a group of students from Worcester Polytechnic Institute in Massachusetts. We are conducting a focus group data collection of the nonprofit organization to learn more about the current and ideal means of communication. This research will be used by us and Caras con Causa to improve the organization’s internal communication. Your participation in this focus group/comparative research/qualitative data collection is completely voluntary and you may withdraw at any time. Please remember that your answers will remain anonymous until we receive your consent to share it. No names or identifying information will appear on the questionnaires or in any of the project reports or publications without your consent. This is a collaborative project between the nonprofit organization Caras con Causa and WPI, and your participation is greatly appreciated."

So is everybody okay with us starting?

Everyone shaking their head yes, thumbs up or verbally saying yes

Participant 1:

So you can start with anyone,

Participant 2:

Good morning, everyone. My name is Participant 2 started. I am actually working as a human resources coordination coordinator.

Participant 1:

Participant 3. Yeah, you're on mute if you're talking.

Participant 3:

My name is Participant 3. I'm working as a communications manager.

Participant 4:

Hi good morning my name is Participant 4. Can you hear me? (People Shaking their head yes) I'm working as finance coordinator,

Participant 5:

Speaking inaudibly.

Participant 1:

Participant 5 we can't hear you very well. Then speaking in Spanish with Participant 5.

Participant 5:

Speaking in Spanish

Participant 4:

Well I'm going to start as finance coordinator I have to work with payroll and also with bender supplier. I have to buy different supplies to the different project. That's are part of my responsibility as finance coordinator.

Participant 2:

Eh, in my case, in the human resources, the environment we work with, I work with everything that deals with equipment and protocols and logistics Mainly with the older staff of the organization. So that is like you're posting from that point to the, to the interviews and the contract that we made.

Participant 3:

Okay. their communication programming is just starting and working with a partner. So basically we create content and sharing social media sometimes how well we like daily in the daily basic as sometimes like educational content from specific topics. We also keep in touch with the community in the social media. And I specifically specifically work more time with the school. So I create like, like the announcement for the school and I keep in touch with the students and parents and teachers and all the staff for the school. And yeah, I think basically that's it.

Interviewer 1:

Right. so on a daily basis, who is everyone in contact with and how is like Like your data being shared and like what kind of data do you collect?

Participant 4:

In my job Is that to keep in contact with different vendors also with the employees to ask for their neededs and things like that. [inaudible].

Participant 5:

Participant 5 speaking in Spanish

Participant 2:

Okay. Well I'm in communication with all the stuff. Maybe there's basically, if they are going to be absent, eh, they are, they need some things that I can, that I can work with or provide them. I, We, we can, we can do it. So in the morning they brought us or write to us to tell us if are going to be absent or they are, they need to come to the school because we are on the (inaudible) for the covid card. So not everybody is going is a 100 percent sure, but we, it, if they need to come or they need to, to schedule some meetings with the school and surparents, but I, I have them with the logistics and if we are going to make any activity, eh, we make sure I make sure that the, or the protocols that are, and that we already implementing with are known and the right way,

Participant 1:

And Participant 2 right now, like a little bit team members have to fill out a form every day, or like, COVID right.

Participant 2:

Yes.

Participant 1:

How do you keep track of that?

Participant 2:

It's a google form. And they use our work form, and I receive it in the mornings. And I, if I see there, have any symptoms, or are there any first one or I didn't drop anyway, I called them. And I said, wait you have to stay home monitoring constantly with the person, one employee. And that's for everybody in the, every staff in the organization, there are going to be basics or a, (inaudible word) but we use it too,

Interviewer 2:

Sorry. Did you say you were using a system online? It was a little hard to hear you.

Participant 2:

It's in Google forms. That's the one that I use is here and that has their spreadsheet. I probably station at the moment.

Interviewer 3:

Sorry, I have a quick question for Participant 4. You said you kept contact information of different vendors. So where do you keep that or record it?

Participant 4:

Quickbooks, the accounting system that we use to enter, or the accounting data,

Interviewer 2:

Then I had a follow up to that. How are you staying in contact with the vendors by emailing them or was that we heard yesterday, you guys kind of use WhatsApp as well.

Participant 4:

Sorry?

Interviewer 2:

Are you keeping in contact with the vendors you talked about through email or another platform? Cause we heard a lot of you in the organization use WhatsApp

Participant 4:

Email, WhatsApp. I use email,

Participant 3:

I think it's my time in the daily basic, I'm mostly giving dash with like they aren't as administration Participant 5 and the school director to know like what's happening, but we have many programs. So I also have to like keep in touch with the leaders of those programs, to know what is happening in them and to document and share what is happening in all the organization. And I share it mostly through Facebook and Instagram. The goal is to share that content to through email, but I think we need like a, a place where we can like have all the contacts, the donors, the volunteers, the community. So it's easier for us to share like that info through email too, because we know not everyone it's like on social media and the data we collect is mostly like what we post. I have like a calendar with all that information. I try to do it like at the end of the month and we don't do it, but we're supposed to like get the inside of the poster. Like how many people are we reaching? I am usually like looking at those numbers, but we are not like collecting them in any way. So yeah.

Interviewer 1:

So is that like likes and stuff on the post?

Participant 3:

I only see them. I did it like last semester at the beginning of this semester for some specific programs that they asked me, like the numbers, but not for all that. We post like the likes, the ins, the, how many peoples share and saw the post, the post them. Yeah.

Interviewer 1:

So if you were to do it like started doing it again how would you like store that just like in an Excel sheet or

Participant 3:

I haven't actually Uh I think I have already a table where I put like the post, the picture I post and they like description. So I guess I can include it there, like make another column with that info. Maybe it would be easier for me.

Interviewer 4:

Just to follow up on that. Do you think it would be helpful to visualize the growth of, for example, how many people do you the page and everything on that, do you think that will be helpful?

Participant 3:

Definitely. I am trying, like, I know it's maybe like small, but I am trying to like get to, to any salon in particular in Caras it has like 900 followers, so I'm trying to get it to a thousand. So I am keeping in touch with the followers right now, but not that much as I should. So maybe I wait to see how much he had. It has grown since I started working in social media. It would be great.

Interviewer 1:

So here's the next question I have is what do you like about your current method of doing things

Participant 2:

And in the case, eh, actually I'm not using a platform or Excel. I like to use Excel, but it would be better if I have a platform where I can have all the information of the employees, eh, or the persons. There are other people eh, aren't interested in being part of the, or the think of the team so I can have better, eh, reach. I don't know how to say it, that the, of the information, because right now, eh, if I interview some, anybody, I have a phone screening sheet, but it's on paper, so maybe I can use Excel or whatever the form. So to have that, that, that information. As well as the attendance we use, we use Ali Pay, eh, maybe someplace that we can go and see, okay, this person, or we have these weekly and we can see the change.

Interviewer 1:

Is your attendance just for the school?

Participant 2:

Excuse me.

Interviewer 1:

Was the attendance for school or am I misunderstanding something.

Participant 2:

For others, for our staff.

Interviewer 1:

Okay. So it's like a lot of people that you're collecting info on then, right?

Participant 2:

Yes. In my case the staff or the staff.

Participant 1:

Participant 3, Participant 4 What do you like about the system that you have in place right now? Or what are you don't like?

Participant 4:

Well, I use as I say, enter the accounting info of all the different expenses. Right now I like it to use it because any reports that the management and me, and also I use other bank ADB to enter the info about the Paid rin?. Both, both system, like, because are very friendly. Also about the reporting that I asked if the management asked me about something, I go to AliPay and the report that they asked me.

Participant 5:

Yeah. To clarify if AVB is a United States company, but we will be changing to a local company, but it's basically very similar or the same to other banks. So for example, when somebody from our staff will be upset or late, eh, eh, eh, eh, we have a chat that, eh, we notify the [inaudible]. And when you said mainly for notifying, somebody fades out saying, or on COVID protocol or something like that. And next week, Participant 2 and I were talking, starting to tabulate this information so that we can start giving reports. So team members, you know, you've been absent or you're been tardy X amount of time, eh, and so say sometimes we use it also to coordinate if we're going to order lunch together, but I think that's separate. And so I'll say if I think that we depend a lot on WhatsApp to communicate deep in ourselves, regarding team members and also with Participant 3 when she was talking, I was, eh, we, we shared with you the table where we're collecting the information, I'll see it from what she is publishing on a weekly basis for each page. But I was thinking when she was talking, you know, if she wants to make a post to highlight a success story of a participant. So recently we had public speaking competitions and two of our students won, she has to call the teacher or call me and say, who is this person? And what is the background information that I'm going to post, or if we're going to celebrate the community leader, I'm the one who has most of the contacts on my cell phone. And I have to tell her, this is so and so, and this will be who or who she is and what she does. so this is just adding to the comment that she said about one database, where we have different types of information. If, if she wanted to celebrate the week of social workers, she would have to contact Participant 2. So laughter how many social workers or what are the grades for the social workers, you know, work with? And we're doing a lot of internal things of celebrating like the internal culture of the organization or trying to do team building efforts. We're always trying to figure out by hand how many are from the local neighborhoods that we serve? How many are women? How many are men, that sort of stuff. And we've been, we've been starting to populate Excel sheets with that information to facilitate that information. But we don't have any systems in place for either one. And this is the reason why you guys are working on this. If I, with the participants that we don't have one central database. And, and so that's, that's how we've been doing it right now. I think it's a new trending term. It's like it's been done organically. So the category, yes, we've been growing. We started to scramble on how we manage the information, but we don't have any systems in place.

Interviewer 4:

One question you're saying that you record the data in Excel sheets, then do you upload that on Google drive or is it the sheets in Google? I'm just wondering,

Participant 5:

Eh, eh, I think we're talking about Excel and we have a mixture of drive, personal computers, USB and Dropbox. And so, eh, for some things that are more official or confidential, we try to use Dropbox for things I can just be shared. We'll use the drive And we're all catching up on learning how to use it Right.

Interviewer 1:

So for something like the attendance data so Participant 2 you have that on you on like your computer? It's not uploaded or shared with everyone. Am I understanding that?

Participant 2:

No that's right

Interviewer 1:

Okay. So if someone asks to look at the volume, like the attendance for something, for like a report did they just have to email you and try to get it? Is that how it works? Okay.

Participant 2:

Yes. Mainly. Weekly I, I inform the team, the leadership team like who was absent today.

Participant 1:

So, that information with human resources specifically is only shared with the leadership team. It's not shared with anyone else in the organization.

Interviewer 1:

So I guess the next question I have is how does everyone feel about transitioning to a new platform? Would you be comfortable or hesitant? Yes.

Participant 2:

I would, I would love it actually I like excel but if we had another platform it's better

Interviewer 1:

So you'd prefer everything being centralized, like Participant 5 said, okay.

Participant 2:

Yes,

Participant 3:

Me too. I think we need it like really native because in my case I worked with all of their programs. So I'm always like reaching to someone different to get the info I need. So it would be great to have it like just in one place we use Google drive, but sometimes not everyone like share the things in Google drive. So it's kind of hard to like, try to yeah. Get the info at the moment. I need it asking everyone that has some part of the info and not all info. So it will be great to have like a place.

Participant 4:

Me too They, they think that in one place very helpful

Interviewer 1:

Uh does anyone else on my team have any questions.

Interviewer 4:

Um I had one question. So you just said that you're still getting to learn Google drive in using that. Do you think your team would be comfortable with a whole other new platform and transitioning into it? And do you think it, your team will need a lot of support? Technologically,

Participant 5:

I would need a lot of technological support. I think everybody, I think everybody is as desire, as much as Participant 2 and Participant 3 perhaps as a platform. And I think that now we are ready to move in that direction and our board of directors is aware of the need. And so they are willing to support how that would reflect on the budget. So I think that, you know, ideally this would be a key, eh, goal for the organization is to continue with process in being data driven. But also more organized in terms of the specifics that we have of our internal team and our work that we do in the community. So I think in general, there would be a lot of interest in this happening and I as director, I would be committed to creating the calendar of professional leader alignment that would be necessary for everybody to learn how to manage the whatever program we selected.

Interviewer 4:

So that brings me to another question. Financially speaking CRMs do cost A bit of money, not a bit, but depending on which platform we're talking about, it's gonna meet of financial resources. Do you guys think that you can allocate those funds for it? Or are you guys not willing to do that?

Participant 5:

I think that the will and eh, the desire is there. I don't know that the money is there, but because the will and the desire is there, then it's a matter of putting it in our budget. And then establishing the fundraising goal and the way that we would, manage it, that we would distribute the cost of the platform the individual budgets of each product like or project [inaudible] program usually cost about $25,000. And now we got a way of improving our direct services (inaudible)

Interviewer 4:

Makes sense.

Interviewer 2:

So a question I had then was how, how are you guys currently keeping track of the donations that you're getting from your sponsors or anything like that? Like how, and where are you keeping track of that?

Participant 5:

Inaudiable speaking

Interviewer 4:

For interrupting you, we can't hear you properly.

Participant 5:

Can you hear me better now? No. Okay.

Participant 1:

It comes and go's

Participant 5:

Like my attention,

Interviewer 2:

It's good now

Participant 5:

I think I need to be leaning this way. We've gone through fact that in a more formal way. So usually I would manage a lot of the collaborations with the donors and I would sign a contract and then we started minutes writing it. But we didn't have a centralized place. A group of people did a pro bono work similar to what you are doing. And they created a database for that. And that keep track of the donations we have received, and the grants that we were applying for if Excel sheet and also in the budget, the treasurer of the board of directors created a sheet within the budget that puts the donor and the amount and the project that it is assigned to. And now we are In the process of rethinking how we, our leadership team, because right now our leadership team, our administrative team is basically us three and, and Hennessy. So we just create, we just have this new role. But we're also very much involved in direct services. So we need to think about how do we create the administrative structure to support the organization. And one of those positions is maybe a grant manager or complaints officer or something along that, you know, like something that in that ballpark where it would be a person who helps manage the relationship with the owner, who will make sure that we're reporting on fine, that we're keeping track of the expenses. You know, we're, we're complying with would, they were doing that activity that they wanted to, because many times you propose. So they also tell you what they want you to do, and you need to like keep track of making sure you did that check Mark. So they feel like you know, so, so we are looking at creating that position that is a budget issue, because we have a lot of losses because of COVID. So Participant 4 and I are, are doing the budget for next year. And so hopefully that position would be included as would be communications, operation CRM tracking database. I believe that there's some CRM second database or something that you could include your donors as well. That's your participants and your volunteers and your personnel. So we, you know, we would, we would probably use that as well for managing our donors.

Interviewer 1:

So is there anything else that anyone would like to say or add?

Participant 5:

We haven't talked about inventory, but that's part of the budget and finances is keeping track of inventory. Participant 4 purchase, a system that he can explain about, but it has like tags or whatever, like those stickers that have a barcode. And somehow we have that. I don't know that that program speaks to any other database or anything like that, but they know we have it there and it's for reporting purposes to donors, to eh, department of education. And then also for budget purposes. So like part of your budget has to do with what active you have and the value that it's attributed to them. So you have to use it for those three purposes. Now you see for planning, right? So like right now we need to plan an activity in the afternoon and we need to know how many tables and chairs we have available. And if some are being used outside in the front, or if they're going to be used in the back, so believe, you know, your mind, we know we have 20 and there's five outside. So we know we have 15 left over.

Interviewer 4:

Does the result of your like inventory go into a spreadsheet too, and who's that spreadsheets shared with,

Interviewer 2:

Or even who's keeping track of that for you.

Participant 4:

Right now? All we keep the spreadsheet on the computer. So,uwe don't share with,uright now we don't have to with nobody Okay. Between me and the other guy that were there, Participant 5, that when he asked for something specific, but we don't share with any, with anyone. And no one typically asks for it, except for like one or two people.

Participant 5:

Exactly. Like we don't have problem sharing. It it's that nobody, you know, Participant 1 hasn't asked me recently how many we have available. There's something. So it's usually just like donors or for audits when they're auditing and that sort of stuff. Okay.

Interviewer 3 :

And back to the donation question what are some ways that people are donating to you? For example, if they just call in and make a donation or they just send in a check or is through your website, Caras con Causa like what are some ways that people could donate?

Participant 5:

So individual donors, maybe sometimes they follow up or they're referred to us like somebody and we have an initial conversation or through email and you write something and then they give us a donation. We prefer a check and sent by mail because wire transfers, they take away $25 in the local bank. And maybe it's a little bit, but those $25 create a hole in the budget. We used to have a lot more traffic on PayPal donations through the website, but we use Squarespace. And then Squarespace tried to create their own competition of PayPal. And it makes it a little bit more complicated for people to donate through PayPal right now or through our website. And so, like, for example, I I've had informal conversations with super feeble and I'm saying, you know, like if, if you can give me $2,600 that would sponsor a student for one year in the school, and then I send them the link of the website and there's always some sort of a follow on because, and Squarespace has gotten a lot of backlash because of it, but they want to, they're keeping that service. Uh we have something local, that's like PayPal, it's called mobile ACM. And here we say, [inaudible], I don't know what ATM is, but anyway, it's like ACM. and so you can send it directly through the phone, but we haven't really worked on campaigning to get donations through to Apache mov. We're also signed up on eBay charity and Amazon charity. We haven't received any donations through there, but I think that that is a branding issue because we haven't done any campaigns either through ebay or Amazon, but we up here with our, our original name and Caras con Causa current name. So we need to work with our accounts and so that they write the IRS and we change the name. If we change the name well, we haven't done any that the IRS. And so I think that that would make it easier for people to look us up and donate through those platforms. people, candle wire transfers. Sometimes we get wired random wire transfer. So $5,000 because there is a local law like tax breaks to multimillionaires from the United States that they have to donate $5,000 to a nonprofit. And one time I spoke to some guy from someplace called Merry Lynch or something, and we are on his list of charities to recommend to his client. We should probably work on getting on more people's broker's list, but I'm not even really sure how that works or how we ended up on that one list. But those are the ways that individuals would be donating to us. We hope to, we created a, or somebody created for us a business plan to launch a, eh, like a t-shirt brand so that we can start selling shirts t-shirts online, whether it's on the website or on Instagram or Facebook. we haven't launched that yet, but we hope to,

Interviewer 4:

I was wondering if you've done any sort of donation or donor attraction on your social media, like putting up in asking people to donate like bingo boards.

Participant 5:

No, not yet. I, for two reasons, I think that we've never really had anybody focused on doing that at all. And I think that is the first time we have somebody managing communications which is Participant 3, but our goal for this year was improving communication with our community. Serve. Ask it again. I'm sorry, One, one moment. And so I think, I think that later we would then focus on maybe doing that, but I didn't want to do any like fundraising campaigns on social media that kind of makes me feel uncomfortable. And some organizations are like super in your face about money, money, money. I think we need to engage first with our community on social media, and then we can worry about attracting that audit other audience, but it would definitely be in the pipeline of like a fundraising strategy that definitely we need to, we need to work on because we need the money. I have to excuse myself for 30 seconds. I have to sign a document for somebody there and I'll be right back I'm very sorry.

Participant 1:

Speaking in Spanish to Participant 3

Participant 3:

No, they usually like ask where can they volunteer maybe? But the other day I I check with Name (the person that brands images for the website) if he goes through the Caras, Causa.org, you can donate, but we check and we (audio cutting out) either

Participant 1:

You haven't checked the page. Where are you headed? I'm sorry, it cut off.

Participant 3:

We check the other day if we ha we still like receiving donors through the page, but there was like none, nothing, everything was like old. So yeah,

Interviewer 4:

When you have people ask about if they can volunteer somewhere and how they can do it, do you keep track of them to see if they've actually like, ended up volunteering or participating

Participant 3:

Like through social media, like asking them if they get, like, not that that's good, because I usually like refer them to, to Participant 1, which is she's the one, like keep tracks of volunteers, or if they ask about like a specific program, like the tutoring center, I give the, their numbers or the info to the person, but I don't keep track of that after.

Participant 1:

No, that's, that's a good point. I hadn't thought of like people who write through social media or like, even through the website. I get emails directly from people inquiring about service through the website and a, I connect them directly to the project coordinators, but I don't specifically keep track of whether they actually, like how many people contact us through like through website or through social media and then actually participated in the service. I should do that.

Participant 3:

I definitely want to work on because we want to keep track of the volunteers and maybe send them through email, like thinking like thanking him, them, or keep track of how many hours they have in their organization. So we can like, yeah, congratulate them. Like maybe you have been serving with us for a year. So we want to like, be aware of those numbers. How many hours, how long have they been volunteering with us so we can like yeah. Send them something. Yeah.

Interviewer 4:

And this is just a thought, but I was thinking maybe if you were tracking who has reached out to you, if they end up not following up with, you can kind of send them an email advertising different programs, but that was just something I was wondering if you're doing or not.

Participant 1:

We're not but we would like to.

Interviewer 4:

Does anyone on our team have any other questions.Remarks, Alright

Participant 2:

Actually I think that I participating in the afternoon meeting so maybe we can speak a little bit about the schools and access with the schools and teachers

Interviewer 4:

Alright so if there are no questions or anything else you would like to talk about, we just want to thank you guys for coming and giving this time to us, we learned a lot

L. Focus Group 3 Transcript

Team Member 1:

Also before we start, um, we're gonna read to you a consent letter, um, because we need to ask you for consent and your permission to, um, ask you questions. And, um, I'm just gonna read it to you because, um, this is a participation that, um, you can withdraw at any point, if you feel uncomfortable, but the consent form, will let you know about that.

“The Consent letter below will be presented to each member that is involved with the preferred methods we will use to perform our objectives. We are a group of students from Worcester Polytechnic Institute in Massachusetts. We are conducting a focus group data collection of the nonprofit organization to learn more about the current and ideal means of communication. This research will be used by us and Caras con Causa to improve the organization’s internal communication. Your participation in this focus group/comparative research/qualitative data collection is completely voluntary and you may withdraw at any time. Please remember that your answers will remain anonymous until we receive your consent to share it. No names or identifying information will appear on the questionnaires or in any of the project reports or publications without your consent. This is a collaborative project between the nonprofit organization Caras con Causa and WPI, and your participation is greatly appreciated."

Um, so is everybody okay with us starting?

Participant 1:

Yes.

Participant 1:

Yes, agree

Participant 3:

It's okay. Thank you.

Participant 1:

Thank you. All right. So the first question is basically an introduction question. We just want to know your specific roles and what you do and organization. Anyone can start.

Participant 4:

My name is Participant 4 and I convinced this excellent, extraordinary human beings to form part of this crazy idea of create a founding projects that look to create change in Puerto Rico.

Participant 3:

Hi, my name is Participant 3. I'm the school director for the Rosalina Martinez school. It's the school that we, that we lead here in Catano Puerto Rico.

Participant 1:

Hi, my name is Participant 5. I am the academic coordination and coordinator in Spanish and history.

Participant 6:

Hi, my name is Participant 6, so I am the math coach.

Participant 7:

Hi my name is Participant 7, the counselors and the coordinator of the the face of the student service.

Participant 1:

I'm Participant 1, I'm one of the coaches in the academic area. I hope was a the elective, the art program, the physical education program, science and English. And I was part of the group of people that helped open the school.

Team Member 1:

All right. So we were wondering each of you, who are you in contact with on a daily basis? Who do you talk with, and if you're ever in contact with anyone in other projects of Caras con Casa.

Participant 1:

Normally we communicate with each other in the coaching and the department with Participant 6 and participant 5 and I, we have a very tight communications is we work in the same department or area and eh, with eh, wellness department, which was case in, we talked, eh, well, I do like twice a week with the counselors and the social workers and within the area of, and directly with the teachers of the, of the areas that I am coaching, which is at the elective, science and English and the outside the school. I do work with the Labcom people, the people that are doing the communitarian lab, a laboratory, I guess that's all.

Participant 4:

Participant 8 And also Participant 9 if i remember.

Participant 6:

I'm basically in touch with special education teachers with math teachers and with all day academic people that work with students, concert, work socials, something like that.

Participant 1:

I work in the same way with students, teachers, special education, and Community service students(?)

Participant 3:

Well Uh with the students also with the teachers and one of the important departments is the counselors and social workers who help the students to maintain touch with this school. So I have to have communication everyday with all these people.

Participant 7:

Yeah. Also I work with other counselors. I work with the social workers and their community, the families, and with other people in the organization that is related with the community and with the teachers and all the people around the school. Yes.

Participant 1:

So the next question is about the information you're currently keeping track of in your own area of work. Do you guys track any of the student information or anything like that? Do you check student participation, grades and things like that?

Participant 3:

Yes. all the students that we have keep records of the assistance and grades we have electronic platform that we collect all that information we ask. With the registrar, that keep in touch what is happening in the form I'm keeping form that the decision that we have to make, we have to have that appointment with the parent because the student is not present in, in, in the index school. We have that information. And also we shared that information with the social workers and the console that they can look for options that we can make that the student being involved in school. Also we have we are now in the internet using the platform that the teacher have to have tracking who the students are in the, in the, in the class. And they have to put their comment on that. We ensure that they, they are a system assist in, in the, in the, in the class that day. And also we have some students that don't have internet in their houses and we secure tent outside of the school that they can move here. And also we, we, we pass a system every day to give in track what, what, what students are coming to our school. And then now with COVID-19, we also have some measure to keep the student healthy. So they, they are, we, we track the information about the health of the students. The main thing that we can let us know that one of the students can put in danger, all the students those information we have to track it. So also the teachers make phone calls to students to keep in touch, and help them to do that. So we have another platform that they have to put all that information that contact with the students be a chance uh to write that, that they have to put in, in that platform. Maybe Participant 4 can get you more information about that.

Participant 1:

What is this platform called? The one that you keep the contacts and messages.

Participant 3:

Participant 4?

Participant 2:

Maybe we can put a pin on that once he comes back.

Team Member 1:

Yeah. so everyone else, do you keep track of any information?

Participant 1:

I do keep track of the results on the grades of the kids to see how they're doing in the classes that we did. I think that most of us do keep track of how they're doing in the, in the classes we coach. And I guess that's it in the, yeah. And also I do keep track of when we're working with modules, so every week the teachers can meet in modules. So I keep track of those, those modules they're edited, ready to print that kind of thing with thing, but it's more like hearing my desk.

Team Member 2:

What are you currently using to track their grades and progress in the class?

Participant 1:

We have go into the system though SIE which is the information system for students that the department of education runs and we have to do it. So we have to go into the SIE and, and download the, the grades from each kids. Also, we use a statistic who gave us the, the numbers and the comparables in each period of grade. And we under, we know how they doing, how we progress about it.

Team Member 1:

Can you visualize that data? Like, do you put it in charts and you see it and do you do that manually?

Participant 1:

Yeah, he, he analyzes the data. From the information like I just said, he makes infographics. Infographics for us, for the student teachers and the parents there.

Team Member 1:

How do you share these information? Like, do you have Google drive or do you just email it?

Participant 1:

Well, first we put it on all to mark. Cause the way now we share with the parent, their student that Im sorry, that as teachers, we in unions, but we don't mail it to the their fathers. We don't do that.

Team Member 1:

But before the infographic is created, the information that you send for the infographic, do you send that by email or do share it in other ways?

Participant 1:

No. It's each teacher at this person design an Excel document in which the teachers put the grades as they correct things, it's like their digital register. So they, they have their Excel in their computer. And then they put up in the SIE, which is online, the grades when we have certain amounts of weeks teachers email us, those excels for us to see, and the analyst gets that information. And from that data, he analyzes. That program is running in all the schools in that, in the, in the Island. So everyone uses it. It's very unfriendly and very hard to work with because especially when you have to put the grades in before the grade report, every teacher in the world it's putting their info. So it, it goes down very often.

Team Member 1:

So everybody shares their data and keeps their data the same way. Am I correct?

Participant 6:

Yes

Team Member 1:

Okay. Awesome. So the next question it's kind of more towards Participant 1cause you said that you are sometimes working with Labcom, so with Participant 8 do you so the participants are the students that participate in Labcom. Do you have a separate tracking of those students? And then Participant 8 does a separate tracking, or do you share that together?

Participant 1:

We actually don't share it well because the tracking of the attendance and the work they do, because this is like a linkage between the teacher, the science teacher. So the teacher keeps track of the attendance with her own way of doing it. Normally they do manual and then they put it up in the SIE and Participant 8 has her own their data intake. And she normally has like list for the kids to sign and it documents for permission and all that kind of stuff. But we actually, I think we don't share the info.

Team Member 3:

So I just want to double check. You said that teachers track of attendance and then usually it's done manually and later and put it online and put it online. Is that that basically SIE.

Participant 1:

Yes, SIE.

Team Member 1:

Well, Participant 4 mentioned that you guys use Illuminate education or mastery. I was wondering what exactly do you use those platforms for and like what kind of data you store on there?

Participant 1:

I'm not sure. Maybe I'm not sure what you're referring to.

Team Member 1:

We can ask that from Participant 4.

Participant 1:

Yeah. Maybe its Participant 8 that asked for that data intake?

Team Member 1:

Well you said that you the school uses eliminate education specifically and not the rest of the organization. So we're just wondering what kind of data goes in there. But we can ask that again, but yeah. So what, is there anything that you don't like about the current methods that you all sorry that you're using currently to track data and everything? Go ahead. Sorry.

Participant 3:

Its about the last question about I mentioned about the form is we use Google drive. So we create a check when the teacher and social workers. Put that information that when they made the call, if they answer the call, it, the mother is by one form or the other form that we are using. The platform that you mentioned about is that we are looking about this platform to send a sample that we want to move to that point in, in in a future.

Team Member 1:

Okay. I see. I see. All right. So those platforms are going to be for contacting with parents and things like that.

Participant 3:

Yeah.

Team Member 1:

All right, cool. So, yeah. My next question was that, do you dislike anything about the current methods that you're using for tracking information of the students and things like that?

Participant 3:

See the, the SIE we, we, we need to use another form that the teacher the assistance of the day, because they see it gave us we can track in real time that the assistant of the students on those days and that the data form can let us maybe to follow that information in real time also to to see the the skills or the students are our success successful in the SIE it's more difficult to see that specific skills and in the other the other way we can look at that information more accurately that we can see and see it and see it. We see the degree of the assignment, or, of the, sorry, I'm thinking Spanish, I'm translating this so a bit difficult. So they examine where their students need to, to improve. And in, in, in that specific mentor

Participant 2:

That you can, you can see the grades of the assignment or the test specifically, but not where they might need some type of reinforcement in their academic proficiency.

Participant 3:

Yeah. Yeah.

Team Member 2:

So I guess I'm a little confused, I guess, the question for all of you, since you say your coaches for these different subjects, so you're not the teacher. Are you someone that helps the teacher with the students in the class?

Participant 1:

Yes, we are. We accompany the teachers, we work hand-in-hand with them, and now in the virtual mode, we see the materials they prepare and we help them develop them. And we go to our virtual classrooms and see how they're doing in their teaching skills. And we help them to develop in many ways and in different themes that we have chosen for the faculty development plan.

Team Member 1:

One question I had is that is SIE a mandated platform that you have to use, or can you move from a way away from it?

Participant 3:

No, we have to use it.

Team Member 1:

Okay. That makes sense.

Team Member 2:

So, since none of you were really sure what mastery or illuminate education is, I'm assuming that's not mandated from the education?

Participant 1:

No. But I believe that those platforms are the ones that they were talking about, how it's going to be easier for them to see the grades and the improvement of the students and where they can improve their skills. But we can double check that with Participant 4. I had one more question. So one of the reasons we wanted to talk to you guys is that Participant 4 believes that sometimes there might be a duplication of data. So sometimes when a student from the school then goes to Caras con Causa and thus some activities, there might be a double counting of those students. And I was wondering if that, like, we want to see where you guys overlap with Caras con Causa basically. And I've only heard of Labcom, but is there anywhere else that the students participate? And if that's not, I don't know if the question was clear

Participant 1:

We did have this happened last year. We have the service, it's the learning part and class that we teach. So the kids went to the Estudia and then went to one Amatos and they went to do work, to do service work. That was last year, this year because of the pandemic didn't happen, but they did go into our projects to do their service hours,

Team Member 1:

Like tutoring service?

Participant 1:

Exactly.

Team Member 2:

Yeah. So is that during school hours or was that just on their own? Was it like the full class that went to those locations and help with this project?

Participant 1:

Yeah, we, we do, we have a class that's call, eh, how many project. And they have to, as part of the class, they have to do high schoolers do 30 hours or 50 hours to seniors. So we divided them in small groups. So they, for instance, if they were allocated in the Estudia, they did tutoring for a, as many days as necessary for them to have the 30, 30 hours or the 40 hours. When, if there were allocated in the truvanas(?), there were deforestation project, eh, they were, they were working there every afternoon till they have the hours, but it was after school. So it was a 3:00 PM.

Team Member 2:

They come in as volunteers or Participants, is that how you would then track them as?

Participant 1:

Yes, I think they're tracked as in the other projects of volunteers. So the part of the, of the platform with the volunteers.

Team Member 1:

When they go to do volunteer work for like community service hours do you track their hours or do you get it from Caras con Causa

Participant 1:

Last year we did it a coordinator from Caras con Caura school. We, I came in the school and track the hours for them and work with the teacher.

Team Member 1:

And did they send those hours for the students? Cause you have to.

Participant 1:

Yeah, so we have to track them in the counseling area and it goes to the SIE too, all those hours go to the SIE they have to track them because it's a requirement for graduation in the department of education.

Team Member 1:

So when the coordinator at Caras con Causa tracks those hours, do they themselves put it in SIE or do they show you first?

Participant 1:

No, we have the, eh, the, eh, she made it, I think it was Excel and she emailed it to us. And then the, they a account of those hours

Participant 2:

Participant 7? Also mentioned that university trajectory also participates it. Students also participate.

Team Member 1:

Okay, Great. Guys, do you have any questions team? Nope. I think we're we don't have any more questions or what I'm seeing from my team. So is there anything you guys think that we should know that would be helpful? That we didn't ask

Participant 2:

If any questions come up later, we can always email.

Team Member 1:

Well, thank you so much for your time. I know you're all very busy. Thank you for taking out the time to talk to us. This was very helpful.

Participant 7:

Thank you. Thank you.

Team Member 1:

Thank you so much.

Team Member 2:

Have a great day. Thank you.

Participant 4:

Gracias

Participant 2:

And Team, if you have any other questions for Participant 4, feel free to email and we can forward that to him. Yeah. Okay, bye. Have a good day.

M. Focus Group Consent Script

The consent letter below will be presented to each member that is involved with the preferred methods we will use to perform our objectives.

We are a group of students from Worcester Polytechnic Institute in Massachusetts. We are conducting a focus group/comparative research/qualitative data collection of the nonprofit organization to learn more about the current and ideal means of communication. This research will be used by us and Caras con Causa to improve the organization's internal communication.

Your participation in this focus group/comparative research/qualitative data collection is completely voluntary and you may withdraw at any time. Please remember that your answers will remain anonymous until we receive your consent to share it. No names or identifying information will appear on the questionnaires or in any of the project reports or publications without your consent.

This is a collaborative project between the nonprofit organization Caras con Causa and WPI, and your participation is greatly appreciated. If interested, we can share a copy of our results with you at the end of the project.

N. Focus Group Consent Form

The consent letter below will be presented to each member that is involved with the preferred methods we will use to perform our objectives.

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______________________________________ ________________

Researcher's name & signature **Date**

______________________________________ ________________

Interviewee's name & signature **Date**

For more information about this research or about the rights of research participants, or in case of research-related injury, contact: cgstrategies_pr_c21@wpi.edu. In addition, include the contact information for the IRB Chair (Professor Kent Rissmiller, Tel. 508-831-5019, Email: kjr@wpi.edu) and the Human Protection Administrator (Gabriel Johnson, Tel. 508-831-4989, Email: gjohnson@wpi.edu .

N. Contributions

Section	Primary Author(s)	Primary Editor(s)
Final Paper		
Acknowledgements/Abstract	YK	YP
Chapter 1: Introduction	TT	YP, SD
Chapter 2: Literature Review		
The importance of non-profit organizations and their requirements for success	YP, SD	TT
Information Management Tools in NPOs	YK	TT
Customer Relationship Management as an information management Tool for NPOs	YK	YP, SD
Chapter 3: Methodology		
Goal & Objectives	TT	SD
Objective 1: Understand Caras con Causa's current methods of information management, target stakeholder groups, and their long-term goals	SD	YP
Objective 2: Verify the understanding of information management within the organization by mapping the information learned in focus groups	SD	YP
Objective 3: Explore and evaluate different information management platforms	YP	YK
Objective 4: Create an implementation plan for the chosen information management	YK	TT

platform.		
Ethical Considerations	TT	YP
Chapter 4: Results		
Results of Conducting focus groups and mapping the findings	SD, TT	YK
Choosing an Information Management Platform	YP	SD, YK
Creating an implementation plan for Salesforce	YK	YP
Chapter 5: Conclusion and Recommendations	TT	SD, YK
Implementation Plan		
Overview	SD	YP
Google Drive Set-up	SD	-
Centralizing data in one Google Sheet with a Google Form	SD	-
Salesforce Glossary	YK	-
Video on Instructions to Customize Fields on Salesforce	YK	-
Transferring contact information from Google Sheets to Salesforce	YK	-
Creating events based on contact types	YK	-
Video on Creating Reports	YK	-
Video on Customizing Duplication Rules	YK	-

Video on Sending and Tracking Emails	YK	-
Transferring Data from a Google Form to Salesforce Using Automate.io	YP	-
Setting up Squarespace Events and Transferring Them to Salesforce with Automate.io	YP	-
Additional Resources	TT, YK	-
Supplemental Materials	SD	-
Slide Design	SD, YK, YP, TT	-
Template for Papers	YK	-
Main Interviewer for Focus Group 1	SD	-
Main Interviewer for Focus Group 2	YP	-
Main Interviewer for Focus Group 3	YK	-
Meeting Minutes for all Focus Groups	TT	-
Transcriber for Focus Group 1	SD	-
Transcriber for Focus Group 2	SD	-
Transcriber for Focus Group 3	TT	-
Contact Information Excel Sheet	YK	
Testing Salesforce	YK	
Testing Zapier	TT	
Testing Automate.io	YP	