



The Urantia Book Fellowship

IT Summit Group Initial Report and Recommendations

Submitted to the Executive Committee July, 2009

Contents:

Cover Letter

I. Introduction

II. Purpose of the IT Summit Meeting

III. The IT Group's Summarizing Perspective

IV. Executive Overview: Outline of IT Summit Considerations

V. Detailed Review of IT Summit Considerations

VI. Additional Items

1. Some Matters Requiring Immediate Attention and Prioritization
2. Present Fellowship IT Services
3. Some General Comments From Meeting Sessions
4. Summarizing comments by Alan Goodman

VII. Appendices

A history of the IT effort with links to pertinent documents is on the website at http://www.fefadmin.org/Admin_Historical_Archive/IT_History.html

July 10, 2009

RE: IT Summit Group Report

Dear Friends;

The IT Summit Group covered a wide range of topics in its deliberations, most of which are of importance to the Fellowship and its work. There was a consensus that we should provide interested persons with an overview of these discussions while also providing a concise, actionable recommendation.

At the same time there was clear recognition of the fact that IT is a service function—it should be a set of resources used by the Fellowship to achieve its global mission as economically, as efficiently, and as comprehensively as possible.

In order to provide a coherent actionable plan, an organizational strategic plan is first necessary. We also need a business plan so that our planning may take place within projected financial constraints.

The group's primary recommendation, offered with a sense of urgency that the Fellowship must make substantial administrative changes if it is to assume a role of leadership in an age of rapidly changing communications technologies.

There are two alternatives, one of which must be chosen.

1. Dumb down Fellowship IT services and resources to a level consistent with its present limited administrative operations and limited skill set of volunteers and members.
2. Assume the responsibilities for undertaking a transformation that would provide appropriate administrative infrastructure to support the implementation of IT services for serious dissemination efforts and development of international social infrastructure.

Out of necessity I am already pursuing option 1. Out of desire to see a more visionary and responsible mobilization of dissemination efforts, I am hoping to see option 2 taken by the organization.

One suggestion is to implement option 2 over a three year period. In order to do this, both the General Council and the Executive Committee must devote significant attention to the matter. A viable strategy for achieving the "Purposes, Intents, and Goals" passed by the General Council must be created. The Executive Committee must put together a long-term plan for financial support of a growing organization. The IT Summit group is fully capable and willing to work

with the Fellowship to achieve a reorganization within a three year period that can place the organization at the forefront of the global dissemination effort.

In the rapidly blossoming digital age, information technologies hold the key to the economic and efficient global spread of The Urantia Book. These technologies will be used by dedicated readers to accomplish this mission. Whether or not the Fellowship chooses to be a part of this effort is a matter of choice on the part of each member of the General Council, the Executive Committee, and the Officers. The only missing ingredient is vision mobilized by dedicated will.

Respectfully submitted for the IT Summit Group,

David Kantor

Participants:

Tim Hobbs – Tim Hobbs generously provided the venue for the meeting at his DataConnect Corporate offices in Colorado.

Michael Challis

Barry Clark

Emilio Coppola

Susan Cook

Paula Thompson

Alan Goodman

Larry Watkins

Michelle Klimesh

Robert Burns

David Kantor

Additional viewpoints and considerations were graciously provided by Troy Bishop

Useful insights were provided by Cece Forrester and Chris Lepine via email

I. Introduction

Dissemination of The Urantia Book stands at the technological door of the twenty-first century—the Third Millennium. Entering this door is a digital process. One either enters or does not enter. One steps across this threshold, neither unconsciously nor automatically, but rather by undoubted self-conscious decisions, funding, commitment, vision, and effective project implementation.

The power of the dissemination process is at a cusp involving orders of magnitude. From within the box of current paradigm, it is not even clear that one is in the box, an outdated box, and that the word is passing on by. To see beyond yesterday's paradigm boundaries, one need only consult a professional IT firm—not just individuals who can create websites, but real power programmers who create the powerful systems critical to the operation of business, scientific, educational, economic, and governing institutions in the world today.

It is essential that individuals assuming responsibility for dissemination of the revelation and service to its readers get outside the present organizational box of pre-digital problem evaluation. Only in choosing to do so and equipping ourselves with new eyes, new understandings, new questions—can we assume the creative roles held for us in potential by our spiritual benefactors, subservient to the good and true laws of mortal readiness and growth.

The Urantia Book Fellowship stands at the threshold. The choice to be made is whether or not the organization is capable and willing to step across the threshold, to seize the unprecedented global communication and dissemination potentials on the horizon—or, to leave this to a new form of organization, appropriate to the digital age, which alternatively will coalesce out of growing networks of independent information workers, eager to take the fifth epochal revelation to the peoples of a struggling world.

II. Purpose of the IT Summit Meeting

The purpose of the IT Summit was to bring together a group of readers representing a wide range of IT and business management backgrounds to review the Fellowship's present IT services and provide informed guidance to the Executive Committee regarding further development, management options, and organizational integration of IT services.

Several years ago the Executive Committee made a decision to sell the Wrightwood office and become a virtual organization, as much as possible conducting its business and dissemination efforts online.

In January of 2008, the General Council approved a statement of "Purpose, Intents, and Goals for The Urantia Book Fellowship Website" which had been developed by an ad-hoc IT subcommittee chaired by Michelle Klimesh. (Appendix I)

In order to provide direction for pursuing these purposes, intents, and goals, the Executive Committee, at its January 14, 2009 meeting, asked a group of IT professionals to consider and respond to five items (Appendix II). Accordingly, in March of 2009 this group of readers, organized by David Kantor, met for a weekend to review the Fellowship's current IT situation and to attempt addressing the items requested by the Executive committee.

The first five pages of this report contain a brief overview in outline form of the contents in the body of the report. Each outline item has a sequenced identifier that may be looked up in the body of the report for further information.

This document is a compilation of comments made during the IT Summit weekend meeting in March, subsequent email discussions, and direct editing of the report by participants.

The next step is up to the Executive Committee. Members of the present IT Summit group generally are willing to engage in dialog with the Executive Committee with regard to the various issues in the report, provided that a clear direction toward timely resolution can be seen.

III. The IT Summit Group's Summarizing Perspective

We are technicians. We each desire to serve the revelation and Urantia organizations with the knowledge and skills we possess. We are facilitators, designers, supporters – not organizational administrators. Ideally, IT services should be deployed to support the economic and efficient pursuit of organizational strategic and business plans as established by, and under the direction and guidance of, the Executive Committee.

As skilled professionals, we feel it is a far better use of our time to pursue things that make the biggest impact on the readership and movement. We need to be empowered to deliver results, to be provided with appropriate administrative infrastructure and guidance. We need an organizational administrative architecture that codifies the up-stream and down-stream information flow so that,

- Organizational information is broadly available to whoever needs it.
- Organizational information is accurate.
- Organizational information is secure.
- Organizational information is easily receivable.

And all this is so that we can,

- Empower readers to do more outreach.
- Empower readers to do more service.
- Empower readers to create community.
- Empower readers to disseminate the fifth epochal revelation.

Empower the Fellowship to operate in as efficient and economical manner as possible, optimizing the ability for contributions to be directly applied to dissemination challenges rather than administrative overhead.

The primary discussions held by the group involved considerations of various approaches that the Executive Committee might consider in migrating its present IT efforts into a more integrated, productive set of services that support organizational strategic and business plans as well as meeting the purposes, intents, and goals approved by the General Council. The creation of sound strategic and business plans must precede the implementation of economic and productive IT architecture and services.

IV. Outline of IT Summit Considerations

Fellowship IT services may be grouped into three general categories.

1. Internal administrative support.
2. Dissemination of The Urantia Book.
3. Support and fostering of social infrastructure—reader services.

During the IT Summit weekend, Friday evening and all day Saturday were devoted to an extensive review of present IT services, projects underway, and some consideration of related problems and undeveloped potentials. Sunday was devoted to reviewing various approaches to putting Fellowship IT services on basis which is more integrated with organizational purposes, strategies, and business plan—with full acknowledgment that some of these elements remain to be put into place before fully functional IT support systems can be created.

It is strongly felt that important organizational administrative issues must first be considered and that such considerations are responsibilities of the Executive Committee rather than the province of technical support staff.

Nevertheless, the group developed some specific suggestions which fall into three categories.

1. Descriptions of various administrative models for managing Fellowship IT services:

- a. Create a CIO/CTO position on the Executive Committee
- b. Create an IT departmental committee
- c. Create an independent Executive Committee advisory body
- d. Create a virtual Society dedicated to Fellowship IT service
- e. Create an IT board under direction of the Executive Committee

2. Suggestions for assuring the availability of appropriate technical support for organizational IT services:

- a. Evolve a full in-house technical development and support group.
- b. Have a single in-house technical coordinator with outsourcing of all technical services.
- c. Identify reader-owned businesses that employ the same experts the Fellowship needs; arrange with these business owners to contribute working time from these employees for Fellowship tasks.
- d. A group of IT professionals create a self-sustaining, profit-making data center—outside of the Fellowship—serving the needs of the interfaith

community, with discounted services provided to the Fellowship and possibly other Urantia organizations.

3. Suggestions for managing website content:

a. Continue with the maintenance and development of a website representing the Fellowship and its interests under the direction of a contracted webmaster.

i. PR committee approach

ii. Internet traffic analysis-based approach

b. Create a CMS (Content Management System) based website.

c. Drastically reduce the scope of the Fellowship website and become a portal to resources developed by independent readers and other organizations.

V. Detailed Review of IT Summit Considerations

Descriptions of various administrative models for managing Fellowship IT services

Comments: The Fellowship is becoming ever more dependent on the effective use of technology and the engagement of individuals with requisite experience. This trend—and dependency—will only increase as technology-based solutions continue to permeate the organization. Management of technology resources (hardware, software, people, costs, etc.) must be effectively aligned with and tightly coupled to the business plan of the Fellowship.

Fellowship IT historically has determined much of its own work slate after the form of Fellowship departmental committees. The Executive Committee first must take a proactive and directive role in establishing the objectives, strategies, projects, and priorities of the organization—and then engage the IT group to determine how IT resources may be exploited for these purposes. The focus must be on results, timeliness, quality, and cost-effectiveness. Expressed differently, it is essential that the Executive Committee provide effective IT oversight.

IT, for its part, must take its direction from the Executive Committee. Concurrently, IT must have a voice that is heard with regard to its own recommendations regarding the organization's strategic plan projects, and priorities. Critical to organizational success is communication and alignment of activity.

For IT a group of technologically capable and experienced individuals is needed. These individuals should have specific tasks, responsibilities, and a structure or framework for the deliberation of direction and policy development. To enable such a group to function effectively requires as a minimum, a designated leader and an organizational structure to resolve direction, priorities, and responsibilities.

III.B.1.a. Create a CIO/CTO position on the Executive Committee

Comments: While this option was suggested, it was not developed. There was concern that adding another officer to the Executive Committee without a clear description for a staff or department would be ineffective. It was felt that a departmental committee with the chair functioning as the organization's CIO/CTO would be a more effective solution.

III.B.1.b. Create an IT departmental committee through a constitutional amendment

Comments: There was a strongly expressed view that the Fellowship should stick with its constitutional structure as it grows, rather than creating additional sub-administrative units.

Uversa Press was mentioned as an example of such a sub-administrative unit which has no constitutional basis but nevertheless is a growing part of the Fellowship with its own set of problems related to lack of constitutional definition and agreed-upon administrative processes. Uversa Press has parallels with the organization's IT services in that it requires guidance from professionals in order to be successful.

This approach helps maintain an integrated organization rather than creating fragmentation or separation.

To further assure an appropriate selection, and as an aid to the General Council during the selection process, a set of qualifications should be established (a job description) and the candidates vetted against these qualifications—a process not unlike the standard industry practice used to hire a senior technology manager.

Pros: This option utilizes the existing Fellowship constitutional structure.

Cons: This option requires careful consideration before any proposal for a related constitutional amendment is offered.

Of primary concern is the makeup of the committee and the qualifications for chair. These necessities would require careful definitions as part of any amendment.

Such a committee would need to be made up of individuals with experience in technologies, project management, and other fields. Simply electing interested volunteers as is now the case with other committees would not be productive—particularly with regard to the chair.

The Executive Committee might be made responsible for the vetting process. Individual committee members would need to be given responsibility for specific areas of IT services such as system administration, website, database, marketing, communications, technical support, and others. A single person or small committee cannot be effective across the growing range of specialized knowledge and skills that Fellowship IT services are beginning to encompass.

The overall coordination would be done by the committee chair which likely would need to be a paid staff position.

The unique needs of this group outlined above require special consideration in the drafting of any constitutional amendment.

Opposition to this option was also expressed with regard to the present perceived inefficiencies of several of the present departmental committees. Concerns were expressed

about levels of accountability that would be necessary with an IT departmental committee that are not presently critical in other departmental committees.

The successful operation of such a committee might also be dependent on the creation of a Fellowship volunteer coordinator. Integration of paid staff and volunteers likely would be an administrative issue.

We do not want highly skilled technical people with limited time to be forced into spending that time filling administrative and/or political roles.

III.B.1.c. Create an independent Executive Committee advisory body

Comments: This option involves the present IT Summit group in a continuing dialog with the Executive Committee in review of the various issues and options provided in this report and their resolution in an agreed-upon approach to Fellowship IT services management and direction. The present group would be free to enlist the opinions and services of additional qualified persons.

Pros: The foundations for this approach are already in place with participation on the part of experienced readers representing a broad range of IT disciplines and experience.

Cons: There was opposition to this option on the part of more than one individual who had served on previous “advisory” committees which met, submitted conclusions, and then saw no action or results. Any such undertaking must include implementation timelines, assignment of responsibility and accountability, and follow-up procedures.

III.B.1.d. Create a virtual Society dedicated to Fellowship IT service

Comments: This option requires the chartering of a new Society—a virtual Society—whose purpose would be to provide IT services for the Fellowship. Such an organization would provide a framework to coordinate a wide range of sub-groups dedicated to specific IT-related tasks. The group would be self-managing, electing its own officers. Such a group would have the ability to raise funds for its work separately from Fellowship budgets.

If such a Society could be formed and if a sufficient membership of professionals could be developed, the Fellowship essentially could contract with this Society to provide services.

This option would require a well-designed liaison position enabling appropriate coordination with General Council and Executive Committee direction and management.

III.B.1.e. Create an IT board under the management of the Executive Committee

Comments: This proposal was offered by Lenny Cowles outside of the work of the IT Summit group and is provided in Appendix III to this report for further consideration.

III.B.2.

Suggestions for assuring the availability of appropriate technical support for organizational IT services.

Comments: Any requests from the General Council or the Executive Committee for additional IT services need to take into consideration whether or not sufficient staff resources currently exist to provide the new service, or should include provision for the hiring or volunteer meeting of the need. At present IT services are continually being degraded by the continuous addition of new requirements with no supportive changes in staffing or administrative procedure.

III.B.2.a. Evolve a full in-house technical development and support group

Comments: There is value in evolving an internal IT department. The Fellowship would attract and hire the necessary technical people to keep Fellowship IT services—admin, dissemination, and reader services—at state-of-the-art levels, developing new ways of exploiting emerging communications technologies for the pursuit of its mission.

Pros: An IT culture evolves its own naming conventions, programming conventions, and commitment to the maintenance of specific hardware and software platforms, an internal developmental history, organizational-specific documentation, and more. All of this is to the benefit of organizational efficiency, flexibility, and potential.

All aspects of the IT undertaking are readily exposed to management.

The organization is never stranded because an outside organization goes out of business or a contracted programmer is no longer available when code needs upgrading or further development.

An in-house IT department allows the organization to provide data services to subsidiary groups which support Fellowship purposes through their activities.

Cons: This is the highest cost option. It is expensive to maintain an in-house IT department because of the specialized skills required of staff.

This option requires the maximum amount of Executive Committee or other internal administrative coordination and management.

Because of the financial and administrative implications, this strategy can only be applied if there is a well-developed and managed long-term business plan.

III.B.2.b. Have a single in-house technical coordinator with outsourcing of all technical services

Comments: This is basically the model currently in use with outsourcing of only a few technical services; the majority remain under in-house management. Tasks could be offloaded to volunteers if volunteers with necessary skills were available. At present there is an insufficient base of qualified volunteers. This approach currently is being used to deal with work overload and tasks which require resource development beyond the time constraints of a single in-house technical coordinator.

Pros: This option provides the potential for good oversight and management if the technical coordinator is properly directed. It allows for a minimum of internal technical management and staff.

Outsourcing enables the organization to take advantage of new developments and emerging efficiencies without needing to develop the resources in-house. It often eliminates the need for maintenance of internal software, upgrades, and backups.

External resources may be added or deleted as needed.

Cons: This option creates difficulty with coordination of various services because of different platforms, user interfaces, and multiple databases, and data formats.

If the Fellowship does not control its own processes, problems may arise with backups, online technical support being unavailable at a critical time. There may be duplication of effort and data in the use of multiple out-sourced services.

Data that may be highly confidential to the Fellowship is entrusted to outside vendors.

III.B.2.c. Identify reader-owned businesses which employ the same experts the Fellowship needs; arrange with these business owners to contribute working time from these employees for Fellowship tasks.

Comments: There are a growing number of readers who have IT and management related businesses. Under this option, agreements would be made with these business owners to allow their employees to work on Fellowship tasks for a certain number of hours each week at the expense of the business owner.

Example: A reader owns a company which utilizes a CMS for its internal web presence. This company employs a webmaster and supportive technical staff. The Fellowship decides to

use the same CMS software. The company provides the software architecture and technical support. Fellowship committees use the CMS for their respective web presences.

Pros: This option has the potential for making highly skilled professionals available to the Fellowship for specific tasks and projects.

This option relieves the Fellowship from the need to incorporate in it business systems, operations and specialties that do not necessarily require the insight of a reader of The Urantia Book.

Cons: Appropriate tax arrangements would need to be made with business owners to allow recuperation of some of the expense involved.

This approach would require careful and specific management structuring on the part of the Fellowship, perhaps under the direction of an in-house technical services coordinator as described in item III.B.2.b above.

There is risk of a disagreement with the Fellowship or change of employment status with the company causing a rift in the relationship.

In a business downturn the company may discontinue services vital to the Fellowship leaving the Fellowship in a position of needing to scramble and restructure.

III.B.2.d. A group of capable IT professionals create a self-sustaining, profit-making data center—outside of the Fellowship—to serve the needs of the interfaith community, with discounted services provided to the Fellowship and possibly other Urantia organizations.

Comments: This is a very long-shot option that would require significant lead time. The creation of such a business with the ability to offer needed services to the Fellowship is still in early stages of consideration by individuals capable of the undertaking. Executive Committee reaction to such a suggestion would be helpful.

III.B.3.

Suggestions For Managing Website Content

III.B.3.a. Continue with the maintenance and development of a website representing the Fellowship and its interests under the direction of a contracted webmaster.

Comments: This is basically a continuation of the present situation. This has produced concerns about content and image being presented to the public. At a minimum, the organization needs to choose between two approaches to content production and management. These are:

III.B.3.a.i. PR committee approach

In this approach, the organization establishes a PR function somewhere in the organization. This group is responsible for determining the image of the organization and of The Urantia Book that we want to present to the public. From this we then derive an approach to website management, the images we present in our publications, the way we present ourselves at promotional events such as book fairs, and any other place where we communicate with the general public.

III.B.3.a.ii. Internet traffic analysis-based approach

In this approach—which is the one I attempt to implement at present—we study Internet traffic statistics in order to determine what topics people are searching for on the web. We then structure our materials so that anyone looking for specific information related to a Urantia Book topic will find what they're looking for in the context of The Urantia Book. With this approach, search patterns determine home page content, the items listed in indexes, and the overall navigation scheme.

III.B.3.b. Create a CMS (Content Management System) based website

Comments: A Content Management System is a software environment that manages the fundamental processes required to maintain an Internet presence, from website to discussion boards, to email services, to content formatting—and more. For website content, simple word processors are used to enter text. The press of a button uploads the content to the website and in the process formats it consistently with existing material and publishes it in an appropriate place. Tasks such as updating links and tables of contents are done by software in the background without user intervention.

Pros: A CMS makes it easy for anyone in the organization to produce content and have it appear on the web in an aesthetic and managed environment.

The technical aspects of CMS management can be done by persons who have no involvement with The Urantia Book or Urantia organizations other than a contractual one.

Implementing a CMS relieves some of the issues surrounding content management because with a CMS, any committee or group can easily determine their own approach to public presentation. The home page and navigational scheme of the website then serve to direct visitors to these different areas. This relieves the organization from having to deal with PR issues.

Cons: Committing to a CMS is a major step not without its hazards. The Truthbook site utilizes a CMS which was created a number of years ago. This CMS is now obsolete—advances in CMS software continue to appear at a rapid rate. Once committed to a CMS you are pretty much locked into place with it.

A CMS requires a knowledgeable person (or persons) to keep it operating for use by content creators. This person must also be able to activate additional features as they may be requested by the organization.

III.B.3.c. Drastically reduce the scope of the Fellowship website and become a portal to resources developed by independent readers and other organizations.

Comment: A growing number of readers are creating and managing websites that focus on single topics or the providing of specific resources. In the aggregate, these websites provide more resources than the Fellowship can possibly provide. The Fellowship could decide upon a core group of web resources to provide and beyond this serve as an aggregator/coordinator of independent reader efforts. A primary feature of the Fellowship website would be links to these resources. Uversa Press would assume all responsibility for web-based marketing.

Pros: This approach would enable the Fellowship to reduce its costs and website technical overhead considerably. It would foster and support grass-roots developments. It would leave the Fellowship with the need to focus most of its IT resources on administration and web-based marketing.

Cons: Establishing criteria by which reader websites may or may not be included would be difficult and would result in defining the Fellowship in an ideological context which might not be desirable.

VI. Additional Items Noted by Participants

VI.1. Some matters requiring immediate attention and prioritization

Comments: While the Fellowship reviews issues related to overall organization and long-term IT architecture, there are current—some pressing--IT issues within the present system that need attention. The following items were considered urgent and should be given priority.

- The entire set of readership data must be audited so that:

We have the correct contact information.

So that the readership has the right contact information.

So that we know what (non) organic reader structures exist.

So that we can use these structures to expand membership.

So that we can use these structures to expand readership.

So that we can use these structures to further the dissemination effort.

Auditing must be done in conjunction with the creation of sound administrative procedures for maintaining and updating the audited data in order to maintain its integrity.

- A volunteer coordinator position must be established. Paula would be the ideal person to assume this role as Administrative Director if more of her day-to-day work could be automated or offloaded to a volunteer or paid worker.
- Identify the physical or virtual location of all organizational data; clearly assign responsibility and accountability for maintenance of organizational data backups including periodic testing of data restoration. Important information is still scattered in various Society databases and records, personal files maintained by present and former Councilors, audit reports, bank statements, and more.

VI.2. Present Fellowship services and data needing management

- Email lists
- Management of texts (text of The Urantia Book, Paramony, etc.)
- Online conference registration
- Online contributions
- E-publications
- Internal knowledge base
- Meeting minutes
- Committee reports
- Contracts and legal documents
- Financial records
- Contributions
- Budgets
- Bank accounts and investments
- E-commerce services
- Online study group information
- Search engine optimization
- Website content (English and Spanish)
- Help desk and technical support for Fellowship workers
- Server maintenance
- Manage DNS records and domain registrations
- Maintain data backups
- Provide web-based support for conferences, meetings, fundraising efforts, etc.
- Interface with outside service providers and contractors
- Maintain internal documentation such as passwords, service provider contacts, software license registrations, etc.

VI.3. Some General Comments From Meeting Sessions

1. A specific person needs to be given responsibility for maintaining database integrity— meeting records, reader contact information, current officers, current Society information, etc.
2. A three-year plan should be put in place for purposes of integrating a strategic plan, a business plan, and an IT architecture, into a coherent organizational operation. A long-term plan is essential to prevent the inefficiencies of constantly trying to reinvent the wheel. At present organizational planning is almost entirely limited to the annual budget cycle.

3. Communication and training are essential. There should be orientation and training sessions offered at every summer conference. Volunteers, staff, and Councilors all need orientation and training so that they are comfortable leveraging their efforts with Fellowship data services.
4. The Fellowship needs to define a boundary (scope) within which it wants IT services working. A scope document should be developed by the Executive Committee clearly describing IT requirements.
5. All IT infrastructure should be developed to be scalable and internationally applicable—we should always consider Robert’s 10x, 100x rule when implementing technologies or administrative procedures.
6. The website should do more to develop community and facilitate interactions of members.
7. Effective technology plans can only be developed in response to a clearly articulated vision. Specific goals, focused on such a vision once developed need a proactive driver/manager accountable to see them to fruition.
8. Remember Tim’s Five:
 1. Growth (“Be ye therefore perfect...”)
 2. Profit (sustainability + resources for growth)
 3. Truth (“Love others as I have loved you...”)
 4. Fun (Take delight in accomplishment and teamwork; maintain a good sense of humor)
 5. Empowerment (You don’t know it until you’ve taught it to others)
9. Attract folks to an organization that gets a commitment of their passion. Then provide opportunity, resources, and administrative support.
10. Create a contact management system in conjunction with the database and make sure revelation workers know how to use it.
11. The Fellowship needs to be able to accept and use restricted funds. Software can be developed to make this easy to manage and track.
12. Appropriate IT implementations stabilize cultural values through the automation of policies and procedures; a solid, group-sanctioned IT architecture should instantiate the group’s values vis-à-vis organizational purposes and strategies.
13. Make it easy for officers to review contribution and auto-debit records frequently; automate the sending of regular reports?
14. Quickbooks needs to become our payment gateway; change contribution page so that transactions go through Quickbooks instead of Skipjack.
15. Develop a program to exploit pay-per-click marketing.
16. Encourage the use of free online software and services such as the use of Google Docs and Open Office. Organizational software standards can help support more collaboration and communication.
17. The Fellowship should work as a consolidator, integrator, and clearinghouse for reader created and managed web services.

18. Stimulate more committee involvement with IT services by asking, “How can we help you achieve your goals? What services can we provide that would help you with your mission?”
19. We should be fostering an internal culture that demands results.

VI.4. Some summarizing comments by Alan Goodman

The Urantia Book Fellowship Mission. The proposal “Considerations for an IT Advisory Group” outlined our specific meeting mission – to advise the EC on

- Creating long-term plans.
- Financial and staffing considerations.
- Emerging technologies.
- Contractor work and budget requests.

By and large the group came to a consensus on a number of big issues. Does this mean we got *results*? If we think of success in terms of having a good meeting, and providing the EC with some good recommendations, probably yes. Have we advanced the mission of the UBF? Maybe. Maybe not.

This is not to say that planning is bad. Of course not. I am saying, however, that to the degree we overly formalize and, heaven help us, *politicize* the process, the further away we push any real results. Groups, meetings and committees are not just useful tools with which to plan or manage. They can also be a refuge from action and accountability. When all is said and done, no amount of formalized procedures or bureaucratic mandates can guarantee a worthy Vision or its capable execution.

The Limits of Technology. As technologists we often look at the solution to a problem in the context of a database, a plan, a platform, etc. Nothing can be further from the truth. The aforementioned skills/specialties are mere tools in bringing about the one and only true purpose of all such undertakings – business solutions.

When we start thinking the product is the solution, we begin to entertain the same tail-chases-dog paradise from which we should be rescuing our clients. Our job is to help organizations manage their business. And that means to make them faster, cheaper, more organized, more capable, and any number of other designations of *better*. That is where the results are.

Getting and Identifying Results. If we may say that we have met our initial mandate, what can be said of results beyond the obvious? Have we

- Advanced the dissemination of the teachings of the Urantia Book?
- Increased the General Council’s capacity to manage it?

- Improved the UBF's capacity to raise funds?
- Provided cost savings and/or efficiencies to day-to-day operations?

I think we have a shot at it. A shot, I believe, that will be lost if we start chasing a more political agenda. For example:

- Barry's work on translations, and the UB Archive project made us think about creating synergies in our web work that could lead to a more dynamic presence, and a more cost effective way of doing business.
- Tim's discussions on creating crossovers with the non-profit business sector, and to utilizing various in-house business resources could lead to cost savings and more.
- Robert and Paula's discussions on the accounting issues could help us create a better way of doing business, and free up current resources to concentrate more on the work of "the kingdom" and less on that of the IRS.
- Providing services such as dynamic study group finders, comprehensive event calendars and service project opportunities will help create more meaningful UB community, and increase participation and membership.

All these ideas can lead to real results. Not only in the operations of the GC, but in actual cost savings and fund raising opportunities. The question is, do we want to spend our limited time and resources changing the makeup of the EC, or the face of the movement?

VII. Appendices

Appendix I: IT Services Purpose Statement

Appendix II: Five Specific Requests from the Executive Committee

APPENDIX I

PURPOSE, INTENT & GOALS FOR THE URANTIA BOOK FELLOWSHIP WEBSITE

Adopted by the General Council, January 2008

"As faith-enlightened and spirit-liberated sons of the kingdom of heaven, you face a double responsibility of duty to man and duty to God while you voluntarily assume a third and sacred obligation: service to the brotherhood of God-knowing believers."

Three primary areas of focus for the development of web resources:

1. **Dissemination of the revelation**
2. **Socialization of the God-Knowing believers**
3. **Administration of all dissemination and socialization efforts.**

Dissemination:

- **Education** – Educational materials for readers at beginning, intermediate and advanced levels. Also educational materials targeted to young children, youth, adolescents, young adults, parents, etc. These things should be easy to print.
- **Public Relations** – material for potential new readers, journalists, the press, and people checking out what the teachings are about.
- **Marketing and Branding** – Taking advantage of current events by preparing relevant articles and information that people are searching for on the web and can be directed to our site. Example: Articles and references in The Urantia Book to Mary Magdalene as many searches were going on during The Da Vinci Code book and movie press hype. People are always searching and we have the opportunity to bring people to our site through science, philosophy, religion, especially if currently topical. A rich and robust cache of articles, a plethora

of articles that are searchable on the web can bring many people in contact with our website, our organization and The Urantia Book.

- **Retail** - purchase options for The Urantia Book and secondary items.
- **Outreach** – Downloadable and printable brochures and introductory documents to assist others in their efforts of dissemination.

Socialization:

- **Communication** – Email lists, electronic newsletters, downloadable publications like the Herald and The Mighty Messenger, posting news of interest to Urantia communities, administrative announcements for Fellowship members.
- **Calendar of Events** - Urantia related with dates, time, location, contact info (There is a very nice one on the Urantia Archive site.)
- **Pictures, Articles and Information** - of readers and people in the movement past and present.
- **Contact Info** – for Societies, committees, Fellowship staff and officers, study group & related study group help.
- **Conference info** - Fellowship Conference announcements

Administrative:

- **Database** - For the Fellowship and for Societies and related groups.
- **Book keeping/Accounting** - for Fellowship and for Societies and related groups.
- **Files** - with forms, procedures, policies, contracts and agreements, etc, password protected at various levels. For Fellowship officers, EC, GC, employees and contracted. Also for Societies and related groups.
- **Organizational structure** - what the TDA, EC and GC are and who they currently are. Easy access to society information and contacts. Password level protected.
- **POS** - On-line Point of Sale connected to the accounting package.
- **On-line reports** - various accounting reports, membership reports, etc. A variety of reports that improves the management of projects, activities, committees and events of the

organization.

The Goals for our Website

Dissemination:

GOAL: Be the premier site for dissemination of The Urantia Book.

- Make the book less mysterious and more relevant
- Make the book readily available and relatively easy to purchase.
- Offer the book available in every language whenever possible.
- Offer relevant beginner, intermediate and advanced studies of the book.
- Offer good children's and family courses for the book.
- Maintain a pace of technology development sufficient to assure our ability to provide state-of-the-art web resources and services including multi-media, interactivity, and administrative support for dissemination programs.
- Identify opportunities for stimulating traffic we may not have already considered.

Note: Concerning dissemination, there are three basic groups of visitors to our site.

1. Those who read the book and are looking for contacts and/or information.
2. Those who happen upon our site and know nothing about the book or about us.
3. Those who have heard something about the book and are curious about it and/or us.

Catering our menu of information to these basic groups is a good way to measure the relevance of what we add to or take away from the site.

Socialization:

GOAL: We want to make it simple for readers and interested people to find and connect with each other.

- Create the most comprehensive list of contact people available anywhere.
- Make the most comprehensive Study Group Directory available anywhere.

- Add International groups and willing reader contacts whenever possible.
- Provide a comprehensive, accurate and up-to-date calendar of events.
- Create and provide links to online resources like online study groups.
- Maximize connection to other online communities like My Space.

Administration

GOAL: We want to have highly efficient administrative systems that will allow us to do more meaningful work.

- Automate database and administrative functions wherever possible.
- Provide basic user account options with memory capability.
- Automate response to when response is called for, wherever possible.
- Provide a good FAQ to alleviate having to answer the same questions all the time.
- Automate conference registration.
- Automate online purchase options and integrate them with Quickbooks.

APPENDIX II

Five Requests from the Executive Committee

1. Provide for the Executive Committee a long-term plan for IT services implementation, including but not limited to long-term planning for staff expansion, planning for the implementation of additional services in accord with long-term budget considerations.
2. Advise the Executive Committee on emerging technologies that might be incorporated into Fellowship IT services for the enhancement of administrative efficiencies and economies including long-term financial and staffing needs.
3. Advise the Executive Committee on emerging technologies that might be utilized to further the dissemination mission of the Fellowship.
4. Provide the Executive Committee with informed critique of the work done by technical contractors working under the direction of the Executive Committee including but not limited to website development, Fellowship e-commerce development, database development, and administrative efficiencies related to technology implementation.
5. Provide the Executive Committee with advice related to budget requests submitted by technical contractors prior to the annual budget meeting of the Fellowship.