

ABC EXAMPLE Work Plan
V600 Capstone

Project Overview

ABC has experienced rapid growth over the last several years. The complexities brought on by this growth has led to organizational challenges. As part of a strategic planning process, they identified goals for the next five years, including those for the organization and for guests. The focus of this project will be the organization. This course will explore the challenges and possible solutions incorporating tools and techniques from management, nonprofit management and public policy analysis.

Project Objectives

The goal of this capstone course will be to identify, assess, and make recommendations to address issues associated with ABC's rapid growth and organizational effectiveness. These include:

1. Organizational effectiveness and efficiency (with the rapid growth are there systems that can be improved with minimal or no cost)
2. Improve internal communication including best practices that allow for appropriate feedback of the Executive Director (review, whistleblower, etc.) but prevents indirect communication and triangulation from the Board
3. Increase staff morale
4. Financial stability of FP and weekend funding for ABC
5. Recommendations on increasing fundraising/best practices including gala
6. Review of space needs at ABC and potential improvements/different space utilization in a new space

The remainder of the work plan will be organized based on the above project objectives.

Organizational Effectiveness and Efficiency

Team Objectives

The goal of the organizational effectiveness team is to analyze the current effectiveness of ABC in terms of recruitment and retention, employee training, diversity initiatives, services provided, and internal processes. Our team will create and conduct surveys and interviews with staff and clients. Our analysis of these results and documents provided by ABC will help inform our recommendations for improved organizational effectiveness and the streamlining of internal processes. Further research of best practices will be conducted to inform our recommendations on HR diversity initiatives, job descriptions, and employee training. The organizational effectiveness team will be working closely with the internal communications and staff morale teams as our findings will likely influence their recommendations and vice versa. Revisions and recommendations will be provided to the ABC leadership through the following deliverables.

Team Deliverables

	Dates
1. Organizational Effectiveness Surveys	3/31/2020
2. Human Resource Diversity Initiative Draft	3/13/2020
3. Job Description Modifications Draft	3/13/2020
4. Employee Training Recommendations Draft	3/13/2020
5. Draft Organizational Effectiveness Overview	4/16/2020
6. Finalized Organizational Effectiveness Overview	4/24/2020

Initial Work Plan and Major Tasks

1. Organizational Effectiveness Survey
 - a. Strategic planning process notes
 - b. Effectiveness survey and interviews for staff
 - c. Effectiveness survey for clients
2. Human Resource Diversity Initiatives
 - a. Assessment of current diversity initiatives
 - b. Research on best practices
 - c. Recommendations
3. Job Description Modifications
 - a. Assessment of current job descriptions
 - b. Research on best practices
 - c. Recommendations
4. Employee Training Recommendations
 - a. Assessment of current employee trainings
 - b. Research on best practices
 - c. Recommendations

Team Roles and Responsibilities

Member and Role	Task
JD, Team Leader	Editor, interview process, job descriptions, human resource initiatives
JC, Team Member	Writer, survey creation and analysis
LV, Team Member	Researcher, job descriptions, human resource diversity initiatives
SC, Team Member	Researcher, financial insight, survey creation and analysis
LW, Team Member	Researcher, internal communications insight, human resource diversity initiatives

Internal Communication

Team Objectives

The goal of the internal communications team is to analyze current methods of internal communication used by the ABC and provide recommendations for improvement. The team will conduct research on best practices and methods used both by national and local organizations to determine effective policy, and will revise the current grievance policy accordingly. The team will provide a final internal communications work plan to be implemented by ABC.

Team Deliverables

	Dates
1. SWOT Analysis on current policies and internal communications	02/28/20
2. Finalized Whistleblower Policy/Revised Grievance Policy	04/10/20

Initial Work Plan and Major Tasks

1. Survey Creation
2. Survey Revisions
3. Survey Released
4. Survey Completed
5. Staff Interviews and Surveys Completed
6. Research on Best Practices and Policies

Team Roles and Responsibilities

Member and Role	Task
JD, Team Leader	Drafting and editing, staff interviews/surveys
JC, Team Member	Drafting and editing, best practice research
LV, Team Member	Drafting and editing, best practice research
SC, Team Member	Drafting and editing, SWOT analysis, best practices and policy research
LW, Team Member	Drafting and editing, best practice research
JD, Team Leader	Drafting and editing, interview questions, best practice and policy research

Staff Morale

Team Objectives

The goal of this team is to identify, assess, and make recommendations to address issues associated with ABC’s rapid growth and organizational effectiveness on staff morale. The intent of the project is to craft long-term solutions to boost staff morale within ABC and to improve both employee and volunteer experiences. A “strengths, weaknesses, opportunities, and threats” analysis will be conducted based on past surveys and interviews/surveys set up by the Spring 2020 Capstone class. The staff morale team will also do outside research on effective methods of boosting and maintaining staff morale and strong organizational policy. Upon collecting all relevant information, recommendations will be made on feasible methods ABC can take on to boost staff morale at little to no cost.

Team Deliverables

Dates

- | | |
|--|---------|
| 1. SWOT analysis | 2/21/20 |
| 2. Staff morale and organization policy research | 2/21/20 |
| 3. Draft recommendations | 3/9/20 |
| 4. Final recommendations | 4/10/20 |

Initial Work Plan and Major Tasks

1. Compile Final SWOT Analysis
 - a. Review strategic planning notes on Canvas
 - b. Review previous interview and survey results

2. Compose Interview Questions for Staff and Volunteers
 - a. Craft interview and/or survey questions
 - b. Revise and edit questions
 - c. Release survey to staff and volunteers
3. Draft Recommendations
 - a. Brainstorm and research solutions that are of little to no cost
4. Final Recommendations

Team Roles and Responsibilities

Member and Role	Tasks
JD, Team Leader	Interview question drafting and editing
JC, Team Member	Research analysis and recommendations
LV, Team Member	Research SWOT
SC, Team Member	Interview and survey creation, researching trainings
LW, Team Member	Survey creation, interview process, writing
JD, Team Leader	SWOT, writing

Financial Stability

Team Objectives

The goal of the financial stability team is to first analyze the financial history of the ABC Center over the last 5 years and understand how this has evolved and distill any trends. The team will conduct a ratio analysis to clarify the current financial health of the organization. Then, we will conduct outside research into best financial practices for organizations that are similar in size and scope and provide recommendations on steps ABC can take to improve its financial stability. The financial stability team will work closely with the Fundraising team, with the intent that our analysis can directly feed into their work.

Team Deliverables

	Dates
1. Data entry from audited financial statements from 2014 to 2018	3/13/20
2. Ratio analysis and written explanation of results	3/31/20
3. Research on best practices	3/31/20
4. Finalized recommendations	4/24/20
5. Discussion with fundraising team to share results	4/24/20

Initial Work Plan and Major Tasks

1. Collect financial data
2. Data entry
3. Ratio analysis and explanation
4. Research on best practices
5. Draft financial stability overview
6. Finalized financial stability draft

Team Roles and Responsibilities

Member and Role	Tasks
JD, Team Leader	Best practices research, recommendations
JC, Team Member	Collect audited financial data, data entry, editing
LV, Team Member	Ratio analysis, written explanation, presenter
SC, Team Member	Best practices research, recommendations

Fundraising

Team Overview

The goal of the fundraising team is to make recommendations for ways to improve and enhance ABC 's two signature fundraising events. ABC Center has utilized a variety of fundraising tactics over its 20 year history, expanding in the past couple years to include two types of fundraising events -- a Gala to support ABC Center operations, and a Sleep-Out to support operations. Our team will research best practices in peer-to-peer fundraising and industry best practices. The fundraising team will work closely with the financial stability team to incorporate their analysis into our recommendations.

Team Deliverables

1. Comprehensive review of Fundraising Activities
2. Fundraising Plan including suggestions of best practices in event fundraising used by local nonprofits
3. Recommendations for expanding future fundraising forms and activities

Initial Work Plan and Major Tasks

	Dates
1. Meet with Development Director	Pending
2. Overview of Fundraising Activities	2/28/20
3. Analysis of Competitors	2/28/20
4. Market Analysis	2/28/20
5. Analysis of Internal Environment	2/28/20
6. SWOT	2/28/20
7. Fundraising Plan	4/16/20

Team Roles and Responsibilities

Member and Role	Tasks
JD, Team Leader	Analysis of competitors
JC, Team Member	Interviews, internal analysis
LV, Team Member	Research
SC, Team Member	Research, market analysis
LW, Team Member	Interviews, internal analysis

Space Needs

Team Overview

The goal of the space needs team is to make recommendations for ways to improve the utilization of space at ABC. The ABC has experienced rapid over its twenty years of operation. The center is currently at or over capacity causing a constant strain in space at ABC. Our group will analyze the space of both centers and advise strategies to maximize the space utilization.

Team Deliverables

Dates

- | | |
|----------------------------|---------|
| 1. SWOT Analysis | 2/21/20 |
| 2. Space Analysis | 2/21/20 |
| 3. Proposal of Priorities | 2/28/20 |
| 4. Resource Identification | 3/13/20 |
| 5. Budget | 3/13/20 |
| 6. Progress Report | 4/16/20 |
| 7. Final Report | 4/24/20 |

Initial Work Plan and Major Tasks

1. SWOT Analysis
 - a. Utilize pictures to make analysis
 - b. Evaluate legal restrictions
2. Space Analysis
 - a. Pictures
 - b. Blue Print
3. Proposal
4. Priorities
5. Resources identification
6. Budget
7. Progress report
8. Final Report

Team Roles and Responsibilities

Member and Role	Tasks
JD, Team Leader	FP - SWOT, priorities identification, proposal
JC, Team Member	ABC - research, planning, priorities identification, progress reports, identification of resources
LV, Team Member	FP - SWOT, priorities identification, budget
SC, Team Member	ABC - research, planning, pictures, priorities identification, resource identification, final report, presentation

Management Plan

The following items are relevant to each project group.

Procedures for Changes to Project Plan

1. Changes in the project plan will be communicated to team members during team meetings.
2. Changes in the project plan will be communicated to project managers, NG and BK and Professor L during bi-weekly updates.
3. Capability to implement changes will be evaluated by all team members.
4. Why changes occurred and how changes will be implemented will be discussed with all parties and documented in notes uploaded to the Google Drive.
5. If needed, changes in the management process plan will be decided by majority vote.

Quality Plan

The Capstone class will be in continuous communication with each out and Professor L to ensure the overall quality of generated deliverables. All final deliverables will be reviewed and edited by designated team members to ensure integrity of content and grammar. Any relevant data analysis will be subject will be subject to an internal peer-review process to check for errors prior to submission. Bi-weekly updates detailing progress of each group will be submitted to SD who will provide feedback throughout the project.

Communication Plan

The primary contact between the Capstone class and the client will be NG, with the secondary contact being BK

The Capstone group will meet during the allotted course time on Tuesdays and Thursdays from 11:15pm to 12:30pm in SPEA A205. The groups will communicate times for additional meetings through email or Slack and will have the ability to select their preferred meeting format (skype, in-person, etc.). Communication with clients will be set-up through identified liaisons.

Project documentation for internal documents and deliverables will be managed through a shared Google Drive which will allow the teams to share comments and upload their work. Trello will be used to assign tasks and track the progress of each group throughout the semester.

Each team will present biweekly project updates. These updates will then be compiled into a progress report and submitted to SD.

Project Timeline

Date	Task	Team(s)
Week # 4		
Thursday, February 6	Work Plan	All Teams
Week # 5		
Tuesday, February 11		
Thursday, February 13	Data Entry of Financial Statements	Financial Stability
Week # 6		
Tuesday, February 18	Status Reports	All Teams
Thursday, February 20	SWOT Analysis and Policy Research	Staff Morale
	SWOT and Space Analysis	Space Needs
Week # 7		
Tuesday, February 25	Status Reports	All Teams
Thursday, February 27	SWOT Analysis	Internal Communication
	Competitor, Internal Environment, Market, and SWOT Analysis	Fundraising Team
	Proposal of Priorities	Space Needs
Week # 8		
Tuesday, March 3	Progress Report #1	All Teams
Thursday, March 5		
Week # 9		
Tuesday, March 10	Peer/Self Evaluations	All Teams
	Draft of Staff Morale Recommendations	Staff Morale
Thursday, March 12	Draft of HR Diversity Initiative, Job Description Modification, and Employee Training Recommendations	Organizational Effectiveness
	Budget and Resource Proposal	Space Needs
Week # 10 : SPRING BREAK		
Week # 11		
Tuesday, March 25		
Thursday, March 26		
Week # 12		
Tuesday, March 31	Progress Report #2	All Teams
	Organizational Effectiveness Surveys	Organizational Effectiveness
		Financial Stability

	Ratio Analysis	
Thursday, April 2		
Week # 13		
Tuesday, April 7		
Thursday, April 9	Finalized Whistleblower Policy and Revised Grievance Policy, and Internal Communication Overview	Internal Communication
	Finalized Staff Morale Overview	Staff Morale
Week # 14		
Tuesday, April 14		
Thursday, April 16	Draft of Organizational Effectiveness Overview	Organizational Effectiveness
	Draft of Fundraising Overview and Plan	Fundraising
	Draft of Space Needs Overview	Space Needs
Friday, April 17	Draft Presentation	All Teams
Week # 15		
Tuesday, April 21		
Thursday, April 23	Finalized Organizational Effectiveness Overview	Organizational Effectiveness
	Finalized Financial Stability Overview	Financial Stability
	Finalized Fundraising Overview	Fundraising
	Finalized Space Needs Overview	Space Needs
Week # 16		
Tuesday, April 28	Final Report Draft	All Teams
TBD	Final Presentation to Client	All Teams
		Presenters: RH DS
Friday, May 1	Peer/Self Evaluations	All Teams

Master List - Roles & Responsibilities

Member	Team	Responsibilities
JD, Team Leader JC, Team Member	Financial Stability *	Best practices research, recommendations
	Fundraising	Research
LV, Team Member	Organizational Effectiveness & Efficiency	Researcher, financial insight, survey creation and analysis
	Financial Stability	Best practices research, recommendations
JD, Team Leader JC, Team Member	Internal Communication	Drafting and editing, interview questions, best practice and policy research
	Staff Morale *	Interview question drafting and editing
LV, Team Member	Internal Communication	Drafting and editing, best practice research
	Space Needs	ABC - research, planning, priorities identification, progress reports, identification of resources
JD, Team Leader JC, Team Member	Staff Morale	Research analysis and recommendations
	Space Needs *	FP - SWOT, priorities identification, proposal
LV, Team Member	Project Management *	Primary contact, team assignments and management, final product design, writing & editing
	Financial Stability	Collect audited financial data, data entry, editing
JD, Team Leader JC, Team Member	Internal Communication	Drafting and editing, best practice research
	Financial Stability	Ratio analysis, written explanation, presenter
LV, Team Member	Internal Communication	Drafting and editing, SWOT analysis, best practices and policy research
	Staff Morale	Research SWOT
JD, Team Leader JC, Team Member	Project Management *	Team assignments and management, document merging, writing & editing
	Fundraising	Interviews, internal analysis
LV, Team Member	Staff Morale	Interview and survey creation, researching trainings
	Space Needs	FP - SWOT, priorities identification, budget
JD, Team Leader JC, Team Member	Organizational Effectiveness & Efficiency	Writer, survey creation and analysis

