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# **Project Plan for the TechAssist Program**

Version 1.4, February 2004

Prepared by the Mayberry County Nonprofit Technology Assistance Agency (NTAA)

**[A hypothetical nonprofit program example]**

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(available online at [http://www.slostc.org/tools/project\\_plan\\_nonprofit.pdf](http://www.slostc.org/tools/project_plan_nonprofit.pdf))

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# Project Plan for the TechAssist Program

## 1.0 Project/Program Description

[Describe the long-term or “big picture” vision of the completed program or project. How will it look, smell, feel, taste, perform, increase productivity, help customers, or otherwise benefit human kind? What purposes and dimensions will it entail? How does it relate to your mission, strategies, problem statement, and any other project successes?]

In 1996, the Nonprofit Technology Assistance Agency (NTAA) of Mayberry County opened its doors to offer community-based organizations (nonprofits) Internet services and assistance in conquering the “technology gap.” Many nonprofits lack access to or understanding of the latest hardware, software, and information technology (IT). In an effort to assuage this gap in our county, the NTAA piloted the TechAssist Program in 2002. With a six-year track record of providing effective, low-cost Internet services and training, the NTAA was poised to provide nonprofits additional valuable and much-needed help via the TechAssist Program.

People from the community who are interested in learning more about technology and sharing their knowledge volunteer as TechAssist consultants. They visit nonprofit offices to examine their computers and networks, make recommendations for short- and long-term solutions, and assist with repairs as needed. They can also help install software, tutor, and teach general classes or those tailored to a nonprofit’s specific need. TechAssist services are low-cost for those nonprofits who can afford to pay and free for those who cannot. Our mission is to enrich both volunteers and clients while encouraging a “pay-it-forward” philosophy.

## 2.0 Goals and Objectives

[What are you trying to accomplish? List the project or program goals and objectives in terms that are clear, concise, achievable, and measurable. **Example 1:** By May 2004, the Mayberry Community Center will have served 150 enrollees, 50% of whom will represent under-served populations. **Example 2:** The initial project goal entails producing a four-hour video training series on self defense with an accompanying training manual and resource database to be accessible by college students over the Internet by May 2004.]

**Primary goals:** The TechAssist Program intends to become the primary technology service and training provider for community-based organizations in Mayberry County. By helping nonprofits reap the most from the technology and equipment they already have, and supporting them in devising technology plans and budgets, we can significantly narrow the “digital divide” that keeps nonprofits from fulfilling their highest potentials.

### Objectives:

- 1) By December 31, 2004, 10% of the estimated 950 nonprofit organizations in Mayberry County will have received TechAssist services of some type.
- 2) By December 31, 2004, 25% will have attended computer training classes specifically geared toward nonprofit needs.

- 3) Eighty-percent of TechAssist clients will be satisfied with their technology services and/or training, and will plan on using them again and recommending them to others.

### **3.0 Intended Audiences or Beneficiaries**

[Who will be served by the project or program? Examples include customers, clients, clients' customers, recipients of services provided, communities, wildlife, students, specific segments of the population, and so forth.]

Direct beneficiaries of the TechAssist Program comprise local nonprofits who first become members of the NTAA Support Network and then can demonstrate a need for at least five (5) hours of assistance in one or more qualifying areas. (See Section 5.0, Services to be Provided.) nonprofits participating in the pilot program have included the Mayberry Food Bank, the Mountain Ridge Animal Shelter, and CallOnce Hotline. TechAssist has already received numerous testimonials and letters of thanks from grateful pilot participants.

Indirect beneficiaries of the TechAssist Program include the many clients of member nonprofits. These downstream clients receive much more efficient and effective community assistance from nonprofits who are able to devote their full energies to their primary missions.

### **4.0 Products to be Created**

[Examples include: Studies, reports, manuals, instructional materials, software and information systems, graphics, Web sites, widgets, databases, and the like. Distribution methods and media (such as CD-ROM, Internet, or printed documents) also should be identified. A detailed breakdown might appear in a separate Service Agreement.]

Although the TechAssist Program focuses primarily on technology services, the Program foresees the potential for developing turn-key business solutions from which many nonprofits can benefit. For example, a common need among the pilot program participants has been a database for tracking client services. The needs were so similar that we were able to derive a common specification that can be used for many future clients. This business product eventually can be offered for sale on a sliding-fee basis to TechAssist members and non-members alike, creating another source of revenue for the program.

### **5.0 Services to be Provided**

[Examples include: Providing business software training, after-school activities, wildlife tours, nutritional counseling, copy editing services, day care, and customer satisfaction assessments. A detailed breakdown might appear in a separate Service Agreement.]

The ongoing TechAssist Program services include:

- 1) Assistance with technology planning and purchasing
- 2) Computer, network, and software installation

- 3) Business solutions, such as the design of simple databases tailored to nonprofit needs
- 4) Technical repairs
- 5) Internet connection and e-mail service support
- 6) Telephone consultation, including emergency off-hours support
- 7) General and customized training in the use of computing systems and applications.

To receive services, TechAssist members must demonstrate the need for at least five (5) hours of assistance in one or more qualifying areas. There is no limit to the total number of hours of assistance any member can receive.

## 6.0 Methods

[What general approach and techniques will you use to provide services or develop products for your project or program? For example, will you start by researching and analyzing your audiences' needs, and continue with a series of design, implementation, pilot testing, and deployment activities? When the planning is finalized, you might include a detailed task and schedule breakdown as an attachment or appendix.]

To address a full spectrum of nonprofit needs, the NTAA employs the following combination of approaches, of which the TechAssist Program is one important and integral part:

- 1) A fully equipped training center with twenty computers, an LCD projector, and printer
- 2) A full curriculum of technology-oriented training, with an emphasis on nonprofit classes
- 3) A complete Internet Service Provider (ISP) infrastructure and menu of services
- 4) Public access terminals in the building lobby
- 5) The TechAssist Program with its separate testing and training area, which enables the volunteers to develop the skills they need to participate, including hands-on access to servers running Microsoft and Linux software.

## 7.0 Anticipated Phases, Milestones, and Schedule

[Will your project or program involve an incremental implementation process that will occur over many months or years? If so, what long-term phases do you anticipate? Are there important milestones that will occur within these phases? Can you identify a specific schedule for the aspects you will be performing in the short term?]

We envision four distinct phases for the TechAssist Program, with the most crucial listed first. We anticipate seeking funding for one or more phases per fiscal year, as indicated below. A detailed schedule appears in Section 18.0, Appendices and Attachments.

**Phase 1 (2004-05): Hire part-time TechAssist Program Director.** A technically savvy individual with strong interpersonal skills will be needed to expand the TechAssist Program to reach many more nonprofits than its current pilot program

serves. A Director could also provide technology support to nonprofits, as well as recruit, train and dispatch TechAssist volunteers to nonprofit clients.

**Phase 2 (2003-05): Upgrade systems and software in the NTAA training facility.** The twenty outdated Pentium I computers with 15-inch monitors limit the types of applications that the TechAssist program can use for training, as well as the speed and viewing capacity for demonstrations and exercises. The addition of peripheral devices such as printers and CD-ROM drives would enable the Program to offer more types of training classes. (See also Section 10.0, Required Systems and Equipment.)

**Phase 3 (2005-06): Determine local nonprofit technological support needs.** The NTAA plans to discover through focus groups and surveys which technological services and resources local nonprofits want and need most. Using this information, we can design and expand the TechAssist Program and services.

**Phase 4 (2005-07): Improve TechAssist Program awareness within the community.** Crucial to the long-term success of this program will be a significant expansion of our advertising of the TechAssist Program benefits.

## 8.0 Potential Partners or Collaborators

[Do you anticipate joining forces with other agencies, organizations, or consultants to complete the program or project? What experience, infrastructure, expertise, funding, credibility, or other benefits will they bring to the table?]

One potential collaborator in the TechAssist Program is a for-profit technical assistance provider, CompuVisit. This organization provides excellent fee-based services similar to the free or low-cost services offered by TechAssist. We are exploring a possible exchange arrangement whereby CompuVisit would refer local nonprofit clients to TechAssist for free or low-cost help during regular business hours. Reciprocally, TechAssist would refer clients to CompuVisit for fee-based *off-hours* technical support (the area in which TechAssist has the fewest resources currently allocated).

## 9.0 Sources of Information and Expertise

[From what subject matter experts (SMEs) will you receive information and assistance? Will you need to do additional research, and if so, what sources will you tap? Examples include Internet resources, company documentation, customer feedback, trouble logs, service reports, surveys, evaluation forms, census data, research studies, and the like.]

The NTAA will need consulting help in specific areas to set up the evaluation program. (See Section 12.0, Evaluation Processes.) For example:

- 1) A member of the Board of Directors who teaches at the local university will provide assistance with conducting focus groups to collect information on nonprofit needs.
- 2) A volunteer technology expert will set up the TechAssist database for tracking client services, using the specification derived from experience with the pilot program.

- 3) Other designated volunteers will provide input on the design and administration of satisfaction survey forms, as well as help with ongoing grant seeking activities.

## 10.0 Required Systems and Equipment

[Examples include: Servers, networks, computers and peripheral devices, and other types of equipment. If the organization will be acquiring these items, a breakdown might appear in a separate Technology Plan. If a service provider or contractor will provide the equipment, this responsibility can be explained here and/or discussed in Section 15.0.]

The long-term plan per **Phase 2** of Section 7.0, Anticipated Phases, Milestones, and Schedules requires upgrading existing computers and adding peripheral devices. We have determined our equipment needs for 2004-05 as follows:

**Hardware:** Ten 1.6 GHz computers with 256-megs RAM, 20-Gig hard drives, CD-RW drives, network cards, and 17” monitors.

**Software:** Ten copies of the Windows XP Operating System, plus one copy of the Microsoft Office XP License, all at the nonprofit rate.

## 11.0 Tools, Templates, and Conventions to be Used

[Examples include: Style guides, typeface conventions, forms, file naming conventions, presentation guidelines, procedural outlines, specific software applications, standard operating procedures, and Web page templates.]

The TechAssist Program intends to develop a suite of templates for specialized client uses, such as predefined spreadsheet and database formats. Additionally, we plan to develop a series of Quick Reference Guides to provide a standard set of instructions for many common setup and usage functions, saving the nonprofit clients considerable time and effort in their TechAssist training and orientation sessions.

## 12.0 Evaluation Processes

[How will you evaluate the progress and effectiveness of your program or project? Will you be collecting information regarding how you are carrying out your stated objectives (process evaluations), and how well you are serving your target audiences (outcome evaluations) at various points in time? Will you be using any outside evaluators?]

**Evaluation Milestones for Phase 1:** (See the related detailed schedule in Section 18.0)

**Needs assessment (first quarter).** Conduct a needs assessment with local nonprofits to determine what technological support services they need, using focus groups and a survey. We plan to conduct the assessment and analyze the data in the first quarter.

**Program reevaluation (second quarter).** Based on findings from the needs assessment, we will fine-tune our technological support services and classes for nonprofits. After making the changes, we will begin evaluating the response to the revised program in the

second quarter. We also plan to use pre- and post-service evaluation forms to collect regular feedback and demographic information from class attendees and users of our services.

**Process evaluation (mid-year).** After we have been regularly collecting data with our evaluation tools, we will conduct a process evaluation via an analysis of the evaluation forms to monitor when, where, how, and to whom we are providing TechAssist services.

**Outcome evaluation (year-end).** At the end of the program year, we plan to do an outcome evaluation to find out if we have met local nonprofits' needs satisfactorily. We will accomplish this via an analysis of the evaluation forms collected to date, a focus group study, and a survey similar to those used at the beginning of the program year.

## 13.0 Review and Approval Processes

[Who needs to review and approve each phase, service, product, or other deliverable of the project? What protocol will be used? How will reviewer comments be incorporated or otherwise addressed?]

The NTAA General Manager and TechAssist Director will develop a set of guidelines by February 2004 (see the detailed schedule in Section 18.0, Appendices and Attachments).

## 14.0 Method for Managing Changes and Derivatives

[What is the expected life cycle (or life span) of the product or service to be developed? Will it continue in its current state, be updated intermittently, or phase out within some period? Might a product or service eventually be revamped for a different audience or purpose? What process or procedure will be followed when any changes to designs, products, or services occur? Who will participate in the change process?]

The NTAA General Manager and TechAssist Director will develop a set of guidelines by February 2004 (see the detailed schedule in Section 18.0, Appendices and Attachments).

## 15.0 Project Responsibilities and Dependencies

[Who is responsible for producing the product(s); providing services; and for providing equipment, resources, and training? Who will perform proofing, editing, supervising, translating, and the like? For example, will the organization or agency be responsible for making available any equipment, facilities, subject matter experts, and reviewers? Is a contractor responsible for creating a specific set of products or performing evaluations?]

The responsibilities and dependencies for **Phase 1** are included as part of the detailed schedule in Section 18.0, Appendices and Attachments.

## 16.0 Risks to be Managed

[What potential risks exist with respect to funding, time, and resources? Are there cost, schedule, and quality trade-offs that should be evaluated? Does the undertaking have



sustainability risks that would cause social hardship if the project ended? How will each risk be mitigated?]

We have identified the following risks with respect to the TechAssist Program (related to Section 7.0, Anticipated Phases, Milestones, and Schedule):

- 1) The risk of not receiving *any* of the requested funding for 2004-05, which means that no part of the program can go forward. In this case, we would put the program on hold while we seek other funding sources.
- 2) The risk of receiving only *partial* funding for any one phase, which means choosing among two or more critical needs. In 2004-05, the choice would involve deciding between upgrading ten computers and hiring the TechAssist Program Director. Most likely, we would pursue hiring the Director in 2004-05.
- 3) The risk of not being able to adequately schedule and dispatch the trained volunteers. This concern arises from the challenges of conducting the pilot program, in which scheduling and providing transportation to client sites presented ongoing difficulties. To mitigate this risk, we may need to expand the collaboration we are creating with CompuVisit to include an equitable transportation-sharing component.
- 4) A potential sustainability risk could entail considerable inconvenience to nonprofit clients if the TechAssist Program were unable to obtain funding past a certain point. nonprofits who had come to depend on our free services might suffer considerably by having to seek fee-based services. No ideal mitigation strategy for this possibility exists at this time.

## 17.0 Open Issues and Questions

[What questions and concerns remain after all topics above have been considered? How and when will these be resolved?]

The NTAA Board of Directors has been asked to research whether a broader partnership with other community-based agencies can mitigate the TechAssist Program sustainability risk. The board is scheduled to report on this question at the July 2003 board meeting.

## 18.0 Appendices and Attachments

[If preparing to use the project plan as a project agreement, appendices or attachments can include detailed content outlines, specific schedules, and signatures, for example.]

### Proposed Detailed Schedule for Phase 1:

**December 2003:** NTAA General Manager will recruit a TechAssist Director; the staff and volunteers will create a tracking database and develop a fee-for-service structure.

**January 2004:** Development Manager and TechAssist Director will create a marketing plan, including a direct-mail brochure featuring quotes from pilot program participants.

**February 2004:** TechAssist Director will revise the training program based on the survey data, recruit and train volunteers, and develop systems for dispatching volunteers and processing client intakes. General Manager and TechAssist Director will create guidelines for review and approval processes, as well as for managing changes to services.

**March–May 2004:** TechAssist Director and volunteers will provide technology support services to nonprofits.

**May 2004:** Consultant and TechAssist Director will conduct a process evaluation to monitor the delivery of services.

**July 2004:** TechAssist Director will adjust services and training as needed based on mid-year evaluation results.

**August–October 2004:** TechAssist Director and volunteers will continue providing technical support services to nonprofits.

**October 2004:** TechAssist Director to send a letter to all nonprofits reminding them of the Program’s services and a free “Tech Tune-Up.”

**November 2004:** TechAssist Director and General Manager to conduct end-of-year outcome evaluation, and complete and submit final reports for grants received.