Project Implementation Plan

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Section 1: Project Summary, Project Deliverables And Scope Excludes

Project Summary

The Waco Animal Shelter seeks to implement a new integrated system to streamline operations and improve service delivery. The key stakeholders here are the shelter management, staff, volunteers, and the local community.

The purpose of this project is to replace the shelter's current fragmented processes and systems with a centralized, easy-to-use solution that fully meets their needs.

The new system will:

- Integrate adoptions, volunteer management, employee scheduling, accounting, and donations on one platform
- Allow direct entry of adoption applications via website, mobile and tablets
- Automate manual processes and reduce paperwork
- Provide holistic view of animals, adopters, volunteers, and donors
- Improve volunteer engagement through online profiles and coordination
- Enhance donor stewardship through integrated accounting and acknowledgments

The business justification is to increase efficiency, reduce costs, and improve the customer/volunteer experience. This will further the shelter's mission to increase adoptions, engagement, and funding in order to continue reducing euthanization rates.

The budget for the project is $25,000 in one-time costs and $2,500 in recurring annual costs. The system must be easy to use given limited IT resources. Phased implementation will mitigate risk. Success will be measured by operational key performance indicators such as reduced manual workloads, quicker application processing, and increased volunteering.

Deliverables

Sr. No.	Description	Owner	Comments
1	Requirements Documentation	Doris Amello, Director	Outlines detailed system and integration requirements, as the Director is typically responsible for the overall project vision and ensuring requirements align with organizational goals.
2	System Design Specifications	Elvis March, Operations Manager	Technical specifications for all system components, given the role's likely involvement in operational and system-level oversight.
3	Adoption Management Module	Annie Nguyen, Adoptions Coordinator	Allows online adoption applications, profiles, and tracking; the Adoptions Coordinator is best positioned to understand the functional requirements of this module.
4	Volunteer Management Module	Courtney Patel, Volunteer Coordinator	Manages volunteer information, skills, scheduling; naturally falls under the purview of the Volunteer Coordinator.
5	Employee Scheduling Module	Fred Gonzalez, Office Manager	Scheduling, shift management, time tracking; the Office Manager would oversee staff-related scheduling functions.
6	Accounting Integration	Doris Amello, Director (or an accountant if on staff)	Connects donations to QuickBooks; in the absence of a Lead Accountant in the team structure, the Director may oversee financial integrations, or delegate to a qualified staff member.
7	Website Redesign	Fred Gonzalez, Office Manager (or an outsourced Web Developer)	New site architecture, front-end for online forms; the Office Manager could oversee the redesign, especially if the actual development work is outsourced.
8	Mobile/Tablet Capability	Elvis March, Operations Manager (or an outsourced Mobile Developer)	Apps or responsive site for use at adoption fairs; Operations Manager to oversee due to the operational impact.
9	Data Migration Plan	Elvis March, Operations Manager	Assesses data sources, mappings, extraction, and loading; fits within the operational remit.
10	Training Curriculum	Courtney Patel, Volunteer Coordinator	Courses, manuals, and job aids for all users; the Volunteer Coordinator could extend their role to include training given their experience in coordinating educational activities.
11	Testing Documentation	Elvis March, Operations Manager	Test cases, scripts, tracking of defects; the Operations Manager is likely to be involved in

Sr. No.	Description	Owner	Comments
			system testing to ensure operational requirements are met.
12	Deployment Plan	Fred Gonzalez, Office Manager	Cutover tasks, contingency planning; the Office Manager is well-suited to manage deployment logistics.
13	Support Procedures	Fred Gonzalez, Office Manager	Internal processes for ongoing user support; the Office Manager would likely oversee the development of support procedures and ensure they are implemented effectively.

Out Of Scope

The key exclusions focus on non-core functions, items requiring large effort not justified by immediate benefits, and items that would significantly expand the initial scope, budget and timeline.

Sr. No.	Exclusion	Exclusion Reason
1	Physical building renovations	Outside project budget and scope
2	Animal medical operations	Unrelated to core system implementation
3	Developing a mobile app from scratch	Budget only allows responsive web or simple apps
4	Integrating microchip or other external systems	Not requested and may add complexity
5	Payment processing integration	Already handled via PayPal; non-core function
6	Social media enhancements	Separate initiative focused on marketing
7	Volunteer assistance matching	Insufficient budget and timeline
8	Reporting enhancement	Basic reporting meets needs for Phase 1
9	Onsite vendor training	Online training within budget; onsite is extra cost
10	Historical data migration	Only current data is in scope
11	Ongoing hosting operations	Will be managed internally after implementation

Section 2: Assumptions, Constraints, Acceptance Criteria and Dependencies

Assumptions

Sr. No.	Description	Reason for Assumption	Impact if Incorrect	Comments
1	Key staff will be available for training sessions	Staff participation is critical for adoption	Delayed rollout, poor user adoption	Mandatory training times may be required
2	Adoption process maps are accurate	Provided by client	Rework of adoption module	Review with client during requirements
3	Current website provides sufficient info	New site will mimic existing content	Added time to recreate content	Cache existing site for reference
4	Volunteer skills data is incomplete	Minimal info captured today	Inaccurate schedule assignments	Start skills assessment early
5	2 months adequate for each phase	Typical for this size project	Delayed go-live, rushed deployment	Closely monitor progress to adjust
6	Minimal software customization needed	Leveraging COTS solution	Budget overages if custom work required	Ensure COTS screens match needs
7	Historical data quality is reasonable	No major data issues known	Added data clean-up effort	Assess early in migration planning
8	End user training attendance	Training is voluntary	Poor user adoption and outcomes	Make training mandatory for all users

Constraints

Sr. No.	Description	Reason for Constraint	Impact if Incorrect	Comments
1	$25,000 one-time budget	Client budget ceiling	Cost overruns borne by vendor	Verify full scope fits budget
2	No proprietary hardware purchases	Client has limited IT resources	System requires uncommon supporting infrastructure	Favor COTS platforms
3	Staff availability for training	Staff time is limited	Delayed or ineffective training	Schedule training with sufficient notice
4	Phase 1 rollout by Q3	Shelter seeks improvements urgently	Business benefits delayed	Prioritize critical Phase 1 functionality
5	Minimal software customization	Budget constraints	Custom work may be deferred	Confirm COTS meets key needs
6	Responsive web vs. custom apps	Budget and timeline	Weaker mobile capability	Focus on responsive features first
7	Existing website content	Timeline prevents full rework	Less integrated web experience	Mirror and integrate existing content
8	QuickBooks version and access	Constrained by client environment	Integration may require middleware	Verify early what extensions needed

Triple Constraint Ranking

Triple Constraint	Ranking	Comments
Scope	2	The full project scope must be achieved, but some limitations are acceptable to meet budget and schedule needs. Non-core functionality can potentially be deferred.
Budget	1	The $25,000 one-time budget is identified as a key constraint. Scope may need to be adjusted to ensure budget is not exceeded.
Schedule	3	Meeting timeline targets is important but secondary to staying within budget and delivering core capabilities. The phased approach provides some flexibility.

Acceptance Criteria

Adoption Management

- Ability to create and view pet profiles with all attributes like pictures, age, breed, behaviors, medical history
- Adoption application captures all required fields including name, contact info, household details
- Application automatically checks for adoption prerequisites like landlord approval
- Counselors can add notes and track status of applications
- Customizable workflow for application review, approvals, rejections
- Reporting on application cycle time, sources, approval rates
- Integration with accounting for payment collection

Volunteer Management

- Self-service portal for volunteers to create profiles with skills, availability, preferences
- Skills taxonomy encompasses all volunteer roles identified in project document
- Volunteer shift management with ability to assign positions based on skills
- Calendar view of volunteer schedule with drag and drop shift adjustments
- Ability to mark shifts as one-time or recurring assignments
- Email notifications when new shifts assigned or changed
- Reporting on volunteer utilization, tenure, activity

Donations & Accounting

- Integrated web forms for one-time and recurring donations
- Donations automatically synced to QuickBooks with no manual re-entry
- Donor profiles in system with contact info, history, and notes
- Ability to generate tax receipts for donations
- Reporting on donation types, channels, donor segments
- Secure PCI compliant credit card processing

Website Redesign

- Pet listings, applications, and all forms migrated to new site
- Responsive design supporting mobile and tablet access
- Site supports modern accessibility standards
- Performance testing demonstrates stability under peak loads
- Security testing completed and vulnerabilities remediated

Dependencies

Sr. No.	Description	Reason for Dependency	Impact if Incorrect	Comments
1	Volunteer module completion before employee scheduling	Scheduling relies on volunteer skills/profiles	Inaccurate schedule assignments	Prioritize volunteer module first
2	Adoption management before website integration	Website reliant on backend adoption functionality	Delayed ability to accept online applications	Ensure adoption module APIs available early
3	Data extraction before migration execution	Data must be extracted first for transformation	Faulty or incomplete data migration	Build lead time for data extraction and cleansing
4	Accounting integration after QuickBooks version confirmed	Integration requires specific software version	Rework if incorrect version targeted	Verify details early in requirements
5	Responsive site before tablet use at events	Tablets need responsive site to leverage	Limited tablet use without responsive features	Prioritize responsive web development
6	Staff training before go-live	Users need exposure before launch	Poor user adoption and more support calls	Schedule training with enough lead time
7	Phase 1 launch before Phase 2 development	Learnings from Phase 1 prioritized for inclusion in Phase 2	Phase 2 rework if launched too early	Ensure sufficient gap between phases

Section 3: Rough Schedule, Budget and Team

Rough Schedule

Here's a hypothetical schedule with milestones, assuming we begin the project on November 1, 2023. We'll assume a moderate pace of progress, with each phase given a realistic amount of time for completion:

1. **Project Kickoff**: The formal start of the project where objectives, key stakeholders, and governance structures are confirmed.
2. **Requirements Document Complete**: Documentation of detailed functional and non-functional requirements completed.
3. **System Design Specification Complete**: Finalization of the system design that meets the stated requirements.
4. **Development Phase Complete**: Completion of all coding and internal testing.
5. **System Testing Complete**: System undergoes thorough testing to ensure it meets requirements.
6. **User Acceptance Testing (UAT) Complete**: Key users test the system to ensure it meets their needs.
7. **Training Material Development Complete**: Training materials for end-users are ready.
8. **Training Delivery Complete**: Training sessions for end-users are conducted and completed.
9. **Pilot Rollout Complete**: A successful pilot phase in a controlled environment to iron out any issues.
10. **Full System Rollout**: The system goes live to all users.
11. **Post-Implementation Review**: A review to capture lessons learned and confirm the system is meeting its objectives.
12. **Transition to Support**: The system moves from project mode to maintenance and support.

#	Milestone	Planned End Date
1	Project Kickoff	November 8, 2023
2	Requirements Document Complete	December 23, 2023
3	System Design Specification Complete	January 22, 2024
4	Development Phase Complete	April 21, 2024
5	System Testing Complete	May 21, 2024
6	User Acceptance Testing (UAT) Complete	June 5, 2024
7	Training Material Development Complete	July 5, 2024
8	Training Delivery Complete	July 20, 2024
9	Pilot Rollout Complete	August 19, 2024
10	Full System Rollout	September 3, 2024
11	Post-Implementation Review	October 3, 2024
12	Transition to Support	October 18, 2024

Budget

Creating a rough budget for an IT project implementation, like the one for the Waco Animal Shelter, involves considering several standard categories of expenses. Here's a simplified overview of potential costs based on standard assumptions in the IT industry. Please note that these figures are arbitrary and intended for illustrative purposes only.

- **Personnel Costs**: Salaries for project managers, developers, testers, trainers, and support staff.
- **Hardware/Infrastructure**: Servers, workstations, networking equipment.
- **Software**: Licenses for operating systems, development tools, database systems, and any third-party software components.
- **Training**: Costs associated with training the staff and volunteers on the new system.
- **Consulting Services**: Fees for any external consultants or specialists.
- **Contingency**: A percentage of the budget set aside for unforeseen costs.

Let's assume the following for our hypothetical budget:

- Personnel costs are typically the largest part of an IT project budget, often around 40-50% of the total.
- Hardware and software might account for 20-30% of the budget.
- Training and documentation may take up about 10%.
- Consulting services could be around 10-15%.
- A contingency of 5-10% is common practice to cover unexpected expenses.

Potential Spending Estimate

Sr. No.	Category	Amount ($)
1	Personnel Costs	90,000.00
2	Hardware/Infrastructure	50,000.00
3	Software	20,000.00
4	Training	20,000.00
5	Consulting Services	10,000.00
6	Contingency	10,000.00

Team

Role	**Name/Title**
Director	Doris Amello
Office Manager	Fred Gonzalez
Volunteer Coordinator	Courtney Patel
Operations Manager	Elvis March
Adoptions Coordinator	Annie Nguyen
Volunteers	-
Facilities Technician	-
Janitor	-
Groundskeeper	-

Section 4: Implementation Plan

Plan Overview

Description

The implementation plan for the Waco Animal Shelter's new system is designed to be both effective and minimally disruptive to the shelter's critical operations. Recognizing the unique challenges and activities of the shelter, our approach is tailored to ensure a smooth transition to the new system.

Rollout Strategy

Given the nature of the shelter's operations, which likely includes peak seasons of intake and adoptions, as well as fiscal year considerations, a phased rollout approach has been selected.

This method allows for a controlled and gradual migration to the new system, minimizing risk and allowing for adjustments as needed.

The rollout will be conducted in the following phases:

1. **Pilot Testing:** A pilot phase with key modules will be initiated with a select group of users to test the system's functionality in a live environment.
2. **Phased Departmental Rollout:** Following the successful pilot, the system will be implemented across different departments in stages, starting with non-critical areas and gradually including all facets of the shelter's operations.
3. **Full Adoption:** Once all departments have successfully transitioned and the system has proven stable, a full rollout will be completed.

Data Migration and Integrity

Data is the lifeline of the new system. As such, multiple methods will be utilized to populate the system, including API integration with existing databases, file uploads, and, where necessary, manual data entry. The data transfer process will ensure that the existing records are accurately reflected in the new system.

Auditing and Quality Assurance

To maintain the integrity of the data transferred, thorough auditing will be a critical component of the implementation. Doris Amello, as the Director and client-side responsible party, will oversee a team tasked with auditing the data. The team will have access to a suite of tools, including comprehensive reports and exception reports, which will facilitate the identification and rectification of any discrepancies. Random sampling will also be employed to ensure data accuracy.

Client Responsibility

It is imperative that the client understands their role in auditing data accuracy post-import. While our team will provide the necessary tools and support, the final verification of data integrity lies with the shelter's designated staff.

Conclusion

The phased rollout, combined with rigorous data management and auditing practices, is designed to provide a structured and secure transition to the new system. Through careful planning and execution, we aim to enhance the Waco Animal Shelter's operational efficiency without impeding their important work.

Risks

Technical Risks

1. Risk: Integration complexity with existing systems, especially if the current technology stack is outdated or not well-documented.
    - **Mitigation:** Conduct a thorough technical assessment before the project implementation begins. Engage with technical experts to outline integration pathways.
    - **Owner:** Operations Manager (Elvis March)
2. Risk: Data migration challenges, including the risk of data loss or corruption during the transfer process.
    - **Mitigation:** Implement robust data migration protocols, including backups and data integrity checks.
    - **Owner:** Operations Manager (Elvis March)
3. Risk: Inadequate system performance or scalability that fails to meet the growing needs of the shelter.
    - **Mitigation:** Select scalable solutions and perform load testing.
    - **Owner:** Operations Manager (Elvis March)

Operational Risks

1. Risk: Resistance to change from staff or volunteers who may be accustomed to the current system.
    - **Mitigation:** Develop a *change management strategy* and provide *comprehensive training and support*.
    - **Owner:** Volunteer Coordinator (Courtney Patel)
2. Risk: Insufficient training or support, leading to a lack of proficiency in using the new system effectively.
    - **Mitigation:** Create *detailed training programs and support materials*. Establish a helpdesk for ongoing assistance.
    - **Owner:** Adoptions Coordinator (Annie Nguyen)
3. Disruption of daily operations during the transition to the new system, which could affect the shelter's services.
    - **Mitigation:** Plan the *implementation during off-peak periods* and ensure temporary processes are in place.
    - **Owner:** Director (Doris Amello)

Financial Risks

1. Project costs exceeding the initial budget due to unforeseen expenses or scope creep.
    - **Mitigation:** Implement strict budget control measures and regular financial reviews.
    - **Owner:** Office Manager (Fred Gonzalez)
2. Dependency on specific funding sources that may be uncertain or have strict conditions.

- **Mitigation:** Diversify funding sources and establish contingency funds.
- **Owner:** Director (Doris Amello)

Compliance and Security Risks

1. Failure to comply with data protection laws and regulations when handling sensitive information about adopters, volunteers, and donors.
   - **Mitigation:** Ensure the system is designed to meet all relevant legal requirements. Conduct regular compliance audits.
   - **Owner:** Director (Doris Amello)
2. Security vulnerabilities in the new system that could expose the organization to data breaches.
   - **Mitigation:** Implement a security-first approach during development and conduct regular security audits.
   - **Owner:** Operations Manager (Elvis March)

Project Management Risks

1. Delays in the project timeline due to poor coordination or unforeseen obstacles.
   - **Mitigation:** Develop a detailed project plan with clear milestones and buffer periods.
   - **Owner:** Project Manager (This role needs to be assigned, possibly the Director)
2. Lack of clear roles and responsibilities among the project team leading to inefficiencies.
   - **Mitigation:** Establish a RACI chart (Responsible, Accountable, Consulted, Informed) at the beginning of the project.
   - **Owner:** Director (Doris Amello)

External Risks

1. Market changes or economic downturns that could affect funding or the availability of resources.
   - **Mitigation:** Monitor external factors closely and develop flexible project plans that can adapt to changes.
   - **Owner:** Director (Doris Amello)
2. Natural disasters or other emergency situations that could shift the focus and resources away from the project.
   - **Mitigation:** Create an emergency response plan for the project.
   - **Owner:** Director (Doris Amello)

Adoption and User Engagement Risks

1. Low adoption rates of the new system by the staff, volunteers, or the public due to usability issues.

- **Mitigation:** Engage users early in the design process and gather regular feedback.
- **Owner:** Volunteer Coordinator (Courtney Patel)

2. The new system not meeting the actual needs of the users, resulting in low satisfaction and engagement.
   - **Mitigation:** Implement iterative testing and feedback loops with end-users.
   - **Owner:** Adoptions Coordinator (Annie Nguyen)

Work Breakdown Schedule

1. Pre-Implementation Planning

1.1 Project Kickoff Meeting

Schedule and conduct a meeting with all stakeholders to officially start the project.

- **Planned End Date:** November 8, 2023
- **Duration:** 1 day

1.2 Finalize Project Scope and Objectives

Define the detailed scope of work, including system capabilities, user needs, and integration requirements.

- **Start Date:** November 9, 2023
- **End Date:** December 23, 2023 (aligns with Requirements Document Complete)
- **Duration:** 6 weeks

1.3 Develop a Detailed Project Plan

Creating a holistic project management and development plan including timelines, milestones, and resource allocation.

- **Start Date:** Immediately after project scope is finalized
- **End Date:** January 22, 2024 (aligns with System Design Specification Complete)
- **Duration:** 4 weeks

1.4 Set Up Project Management Infrastructure

Establish tools for tracking, communication, and documentation (e.g., JIRA, Slack, Confluence).

- **Start Date:** Concurrent with project planning
- **Duration:** Ongoing support structure

2. Pilot Testing Phase

2.1 Selection of Pilot Group

Identify and select a diverse group of users for the pilot test, including staff from various departments.

- **Start Date:** After system design is complete
- **Duration:** 1 week

2.2 Pilot Test Planning

Develop a testing plan outlining objectives, methods, and success criteria.

- **Start Date:** Concurrent with pilot group selection
- **Duration:** 1 week

2.3 Configuration of Pilot Environment

Set up the system environment for the pilot test, ensuring all necessary tools and data are in place.

- **Start Date:** Immediately after pilot planning
- **Duration:** 2 weeks

2.4 Execution of Pilot Testing

Conduct the actual testing according to the plan, documenting issues and feedback.

- **Start Date:** After pilot environment is configured
- **End Date:** May 21, 2024 (aligns with System Testing Complete)
- **Duration:** 3 months

2.5 Pilot Test Evaluation

Analyze feedback and performance data to evaluate the success of the pilot test.

- **Start Date:** Immediately after pilot testing ends
- **End Date:** Before UAT begins
- **Duration:** 2 weeks

3. Phased Departmental Rollout

3.1 Rollout Planning

Plan the sequence and timing of the departmental rollout phases, taking into account organizational priorities and schedules.

- **Start Date:** After pilot test evaluation
- **Duration:** 2 weeks

3.2 Data Migration Strategy

Define the approach for migrating data for each department, including necessary tools and personnel.

- **Start Date:** Concurrent with rollout planning
- **Duration:** 1 week

3.3 Departmental Readiness Assessment

Assess each department's readiness for transition, including hardware and training needs.

- **Start Date:** After rollout planning
- **Duration:** 2 weeks

3.4 Departmental Rollouts (Iterative Sub-Phases)

Execute the rollout for each department in sequence, with each sub-phase including preparation, migration, training, and support.

- **Start Date:** After readiness assessment
- **End Date:** August 19, 2024 (aligns with Pilot Rollout Complete)
- **Duration:** Approximately 10 weeks

4. Full Adoption and Post-Implementation

4.1 Final System Adjustments

Make any necessary system adjustments based on departmental feedback.

- **Start Date:** After departmental rollouts
- **Duration:** 2 weeks

4.2 Organization-Wide Training

Conduct comprehensive training sessions for all staff and volunteers.

- **Start Date:** After final system adjustments
- **End Date:** July 20, 2024 (aligns with Training Delivery Complete)
- **Duration:** 1 month

4.3 Go-Live Support

Provide intensive support as each department goes live with the new system.

- **Start Date:** After training completion
- **End Date:** September 3, 2024 (aligns with Full System Rollout)
- **Duration:** 6 weeks

4.4 Legacy System Decommissioning

Plan and execute the decommissioning of the old system.

- **Start Date:** After full system rollout
- **End Date:** October 18, 2024 (aligns with Transition to Support)
- **Duration:** 1.5 months

5. Data Migration and Integrity

5.1 Development of Data Migration Protocols

Create detailed procedures for data extraction, cleansing, and loading.

- **Start Date:** After system design specification complete
- **Duration:** Ongoing with rollouts

5.2 Execution of Data Migration

Perform the actual data migration, closely monitoring for issues.

- **Start Date:** With first departmental rollout
- **Duration:** Ongoing with departmental rollouts

5.3 Post-Migration Data Audits

Conduct thorough audits of migrated data to verify accuracy and completeness.

- **Start Date:** After each phase of data migration
- **Duration:** Ongoing with rollouts

6. Auditing and Quality Assurance

6.1 Development of QA and Auditing Processes

Define the processes for ongoing quality assurance and data auditing.

- **Start Date:** After system design specification complete
- **Duration:** Ongoing with development

6.2 Implementation of Auditing Tools

Set up and configure tools for systematic auditing and reporting.

- **Start Date:** After QA processes developed
- **Duration:** Ongoing with development

6.3 Quality Improvement Cycles

Use feedback from audits to initiate cycles of continuous improvement in system performance and data integrity.

- **Start Date:** After QA processes and tools implementation
- **Duration:** Ongoing post-implementation

7. Client Training and Handover

7.1 Client Training Material Development

Develop user-friendly training materials, guides, and documentation.

- **Start Date:** After UAT complete
- **End Date:** July 5, 2024 (aligns with Training Material Development Complete)
- **Duration:** 1 month

7.2 Client Training Sessions

Deliver training to the client team, ensuring understanding and competency.

- **Start Date:** After training materials developed
- **End Date:** July 20, 2024 (aligns with Training Delivery Complete)
- **Duration:** 2 weeks

7.3 Client-Led Auditing Support

Equip the client with the knowledge and tools necessary for independent auditing.

- **Start Date:** After training sessions
- **Duration:** Ongoing as needed

7.4 Post-Implementation Review and Support

Conduct a formal review of the project outcomes with the client and establish a support plan for the transition period.

- **Start Date:** After full system rollout
- **End Date:** October 3, 2024 (aligns with Post-Implementation Review)
- **Duration:** 1 month

Pilot Plan

A pilot plan is crucial for validating the functionality of the new system in a controlled, real-world environment before a full-scale rollout.

Here's a comprehensive pilot plan for the Waco Animal Shelter's new system:

Pilot Plan for the Waco Animal Shelter

Objective

To test and validate the system's functionality, performance, and usability within a subset of the shelter's operations before the full implementation.

Scope

- Select a representative sample of users from different roles, including adoptions, volunteer coordination, and operations.
- Include key functionalities that are critical to the shelter's daily operations, such as animal intake, adoption processing, and volunteer scheduling.

Duration

The pilot phase will last for 4 weeks, allowing enough time to thoroughly test the system and gather feedback.

Pilot Phase Tasks and Schedule

1. **Pilot Preparation**
    - **Duration:** 1 week
    - **Tasks:**
        - Finalize the selection of pilot users and brief them on their roles.
        - Prepare the test environment with necessary data and configurations.
        - Schedule training sessions for pilot users.
    - **Responsible Parties:** Office Manager (Fred Gonzalez), Volunteer Coordinator (Courtney Patel), Adoptions Coordinator (Annie Nguyen)
2. **Pilot Execution**
    - **Duration:** 2 weeks
    - **Tasks:**
        - Conduct daily operations within the system by pilot users.
        - Monitor system performance and user interactions.
        - Collect data on system usage and any issues encountered.
    - **Responsible Parties:** All pilot users, Operations Manager (Elvis March) for technical oversight
3. **Feedback Collection and Analysis**
    - **Duration:** 1 week
    - **Tasks:**
        - Gather feedback from all pilot users.
        - Hold debrief sessions to discuss experiences and identify improvements.

        - Analyze system data and feedback to identify trends and common issues.
    - **Responsible Parties:** Office Manager (Fred Gonzalez) for coordinating feedback sessions, Operations Manager (Elvis March) for technical analysis
4. **Pilot Review and Adjustments**
    - **Duration:** 1 week
    - **Tasks:**
        - Review pilot outcomes with the project team and stakeholders.
        - Prioritize and implement adjustments based on feedback.
        - Update training materials and user documentation as necessary.
    - **Responsible Parties:** Director (Doris Amello) to lead the review, Technical Team for implementing system adjustments

Pilot Success Criteria

- No critical issues that disrupt the shelter's operations.
- Positive feedback from pilot users on system usability and performance.
- Identified issues and feedback are addressed and incorporated into the system.

Post-Pilot Actions

- **System Adjustment:** Implement changes based on pilot feedback.
- **Final Training:** Update training program based on pilot experiences.
- **Full Rollout Preparation:** Prepare for a phased departmental rollout based on the validated pilot phase.

Communication Plan

- Regular updates will be provided to all stakeholders throughout the pilot phase.
- A final pilot report will be presented to the Director and key stakeholders, outlining the outcomes, lessons learned, and recommendations for the full rollout.

Contingency Plan

- In case of significant issues, extend the pilot phase duration to allow for additional testing and adjustments.
- If issues cannot be resolved within the pilot scope, reassess the implementation strategy before proceeding to the full rollout.

By following this pilot plan, the Waco Animal Shelter should be able to detect any potential issues early on and ensure that the system meets the needs of its operations before moving forward with the training and complete implementation process.

Training Plan

Training Plan Overview

The training plan is designed to accommodate various learning styles and schedules, ensuring that every member of the Waco Animal Shelter team feels confident and competent in using the new system. Our holistic approach towards training includes a combination of online and in-person sessions, train-the-trainer models, and the use of external consultants when specialized knowledge transfer is required.

Types of Training

1. Online Training Modules
   - **Description:** Self-paced online courses that cover basic to advanced functionalities of the system.
   - **Format:** Interactive tutorials, videos, quizzes, and documentation.
   - **Timeline:** Available from the commencement of the Pilot Testing Phase.
2. In-Person Training by Software Company
   - **Description:** Direct training sessions provided by the software company's specialists.
   - **Format:** Onsite workshops, live demonstrations, and Q&A sessions.
   - **Timeline:** Scheduled during the Full Adoption Phase, after final system adjustments.
3. Train-the-Trainer
   - **Description:** Selected staff will be trained extensively to become in-house trainers.
   - **Format:** Intensive training sessions, followed by certification.
   - **Timeline:** Initiate during the Pilot Testing Phase; ongoing as new trainers are required.
4. Outside Consultant Training
   - **Description:** For specialized modules or integration, outside experts will be engaged.
   - **Format:** Workshops, specialized training sessions, and hands-on guidance.
   - **Timeline:** As required, especially during the Data Migration and Integrity Phase.
5. Tutorials and Videos
   - **Description:** On-demand resources to reinforce learning or for quick reference.
   - **Format:** Recorded video tutorials, how-to guides, and explanatory articles.
   - **Timeline:** Development starts during System Testing Phase; available for use by the start of Full Adoption Phase.

Implementation Training vs. Ongoing Training for New Employees

- **Implementation Training:**
  - Aimed at existing employees to transition to the new system.
  - To be conducted in a phased manner, aligned with the Phased Departmental Rollout.
- **Ongoing Training:**
  - A standardized program for onboarding new employees.
  - Includes a mix of online modules and in-person orientation.
  - To be developed in parallel with implementation training and finalized by the Full Adoption Phase.

Training for New Releases of the Software

- **Description:** Continuous education on updates and new features of the system.
- **Format:** Update-specific sessions, release notes, and webinars.
- **Timeline:** As and when new updates or features are released by the software provider.

Detailed Training Schedule and Deliverables

1. Training Material Development
   - **Tasks:**
     - Create a curriculum that covers all aspects of the system.
     - Develop training materials, including user manuals, quick reference guides, and FAQs.
   - **Timeline:** Begins post-User Acceptance Testing (UAT) and completes by July 5, 2024.

2. Training Sessions Delivery
   - **Tasks:**
     - Conduct the Train-the-Trainer sessions.
     - Schedule and execute in-person training by the software company.
     - Organize and facilitate online training courses.
     - Make tutorials and videos accessible to all users.
   - **Timeline:** The bulk of training will occur between July 6, 2024, and July 20, 2024, followed by ongoing sessions.

3. Post-Training Support
   - **Tasks:**
     - Establish a helpdesk and online forum for post-training support.
     - Collect feedback to improve future training iterations.
   - **Timeline:** Starts with the Go-Live Support Phase and continues into the Post-Implementation Review.

4. Training Evaluation
   - **Tasks:**
     - Evaluate the effectiveness of training programs through assessments and feedback.
     - Adjust training materials and methods based on user feedback.
   - **Timeline:** Continuous, with formal evaluations at the end of each major training delivery.

This training plan is being communicated to the client with a detailed timeline, including the dates and session details. Progress will be tracked and reported regularly to ensure transparency and alignment with project goals.

User Documentation Plan

To ensure a successful implementation and long-term maintenance of the system for the Waco Animal Shelter, comprehensive documentation will be created both for technical staff and users. This documentation will serve as a reference guide for system maintenance, upgrades, and daily operation by different user types.

Here's a detailed plan for the development and distribution of system and user documentation:

System Documentation Plan

1. Technical System Documentation
    - **Purpose:** To provide technical staff with the necessary information to maintain and manage the system, handle upgrades, and change configurations.
    - **Content:**
        - System architecture and infrastructure details.
        - Code documentation and inline comments.
        - Database schemas and data flow diagrams.
        - Configuration management and change log.
        - Security protocols and disaster recovery plans.
    - **Creation Timeline:** Begins with the System Design Specification phase and updated continuously as the system is developed and configured.
2. Upgrade and Maintenance Guides
    - **Purpose:** To guide technical staff through the process of applying system upgrades and performing routine maintenance.
    - **Content:**
        - Step-by-step instructions for applying updates and patches.
        - Scheduled maintenance procedures and checklists.
        - Troubleshooting common issues and error messages.
    - **Creation Timeline:** Developed during the Development Phase and revised with each system release or update.
3. Technical Training Materials
    - **Purpose:** To train technical staff on the system's backend functionalities and maintenance procedures.
    - **Content:**
        - Training videos and webinars.
        - Workshop materials and hands-on lab exercises.
    - **Creation Timeline:** Parallel to the development of technical system documentation, to be ready for the Training Phase.

User Documentation Plan

1. Administrator Documentation
   - **Purpose:** To assist system administrators in managing user accounts, setting permissions, and overseeing system operations.
   - **Content:**
     - Administrative dashboard guide.
     - User account management procedures.
     - System settings and configuration options.
     - Data backup and restoration processes.
   - **Creation Timeline:** Developed alongside technical documentation, with drafts ready for the Pilot Testing Phase.
2. Regular User Documentation
   - **Purpose:** To help daily users understand how to use the system effectively for their specific roles.
   - **Content:**
     - Step-by-step guides for common tasks.
     - FAQs and troubleshooting tips for everyday issues.
     - Quick reference sheets and cheat sheets.
   - **Creation Timeline:** Development starts during the System Testing Phase, with materials ready for the Training Phase.
3. Managerial User Documentation
   - **Purpose:** To provide managers with insights on how to use the system for reporting, oversight, and decision-making.
   - **Content:**
     - Reporting features and custom report creation.
     - System analytics and interpretation of data.
     - Oversight of operational activities through the system.
   - **Creation Timeline:** Developed in parallel with regular user documentation, to be finalized before the Full Adoption Phase.
4. Review and Feedback Process
   - **Tasks:**
     - Review documentation with key stakeholders for accuracy and comprehensibility.
     - Collect and incorporate feedback from pilot users to refine documents.
   - **Timeline:** Ongoing, with formal review cycles after the Pilot Testing Phase and after each major update.
5. Documentation Distribution and Access
   - **Tasks:**
     - Make documentation available in both digital (via the system help menu or an intranet) and physical formats.
     - Conduct a walkthrough of the documentation resources as part of the training sessions.
   - **Timeline:** Distribution begins during the Training Phase and is updated continuously.
6. Ongoing Updates and Maintenance
   - **Tasks:**
     - Establish a process for keeping documentation up to date with system changes.

- Designate responsibility for periodic reviews and updates of the documentation.
- **Timeline:** A continuous process, with scheduled reviews after every major system update or change.

The documentation plan is being shared with the client, outlining clear timelines, responsible parties, and deliverables. Each piece of documentation will be tracked for progress and completion to ensure that all users and technical staff have the information they need for a smooth transition and ongoing system use.

Transition Support Plan

Transitioning from the implementation phase to long-term support is a crucial step in ensuring the sustainability of the new system for the Waco Animal Shelter. This transition should be smooth, clear, and structured to empower the client to be self-sufficient while ensuring they have the necessary support structure in place.

Here's a detailed plan outlining the transition process:

Transition Plan Overview

The transition from rollout to long-term support will be both time-based and task-based to ensure all necessary milestones are met, and the system is stable before the implementation team scales back involvement.

Transition Milestones

1. Post-Implementation Review
   - **Objective:** Evaluate the success of the implementation, identify any outstanding issues, and document lessons learned.
   - **Timeline:** Set for 30 days after the Full System Rollout.
2. Resolution of Outstanding Issues
   - **Objective:** Resolve any issues identified during the post-implementation review.
   - **Timeline:** Completion within 60 days post-rollout.
3. Finalization of System Adjustments
   - **Objective:** Implement any final changes based on user feedback and system performance.
   - **Timeline:** Completion within 90 days post-rollout.
4. Long-Term Support Agreement
   - **Objective:** Formalize the support structure, including service level agreements (SLAs), contact points, and escalation procedures.
   - **Timeline:** To be in place by the end of the post-implementation review period.

Transition Activities

1. Support Team Ramp-Up
   - **Tasks:**
     - Train the support team on all aspects of the system.
     - Transition knowledge from the implementation team to the support team.
   - **Completion:** Concurrent with the post-implementation review.
2. Knowledge Transfer to the Client
   - **Tasks:**
     - Conduct training sessions on troubleshooting and routine maintenance for the client’s technical staff.
     - Provide comprehensive system and user documentation.
   - **Completion:** By the end of the training phase.
3. Establishment of Helpdesk and Support Channels
   - **Tasks:**
     - Set up a helpdesk system for logging and tracking issues.
     - Establish clear communication channels for different levels of support needs.

- **Completion:** By the end of the Full Adoption Phase.

4. Final Handover
   - **Tasks:**
     - Deliver a final handover package that includes all documentation, system access, and support contact information.
     - Hold a formal handover meeting to confirm the client's readiness to transition to the support phase.
   - **Completion:** By the end of 90 days post-rollout.

By adhering to this detailed plan, the client will be well-prepared to manage the new system independently while having access to the necessary support resources. Regular check-ins and reviews will be scheduled beyond the 90-day window to ensure ongoing success and to address any evolving needs.

Support Operations

When planning for support operations for the Waco Animal Shelter's new system, it's crucial to establish a clear understanding of the support structure.

Here's how the support operations will be structured and delivered:

Who Will Support the Product?

- **Software Company Support:**
  - The software company will provide initial support, especially for complex issues related to software functionality, bugs, or system outages.
  - The software company's support team will be responsible for updates, patches, and technical troubleshooting.
- **Client In-House Team:**
  - The client's in-house IT team will be trained to handle day-to-day issues, user management, and basic troubleshooting.
  - The in-house team will act as the first point of contact for the shelter staff encountering issues.
- **Combination:**
  - For optimal efficiency, a tiered support model will be used, combining the strengths of both the software company and the in-house team.
  - Regular issues and user support will be managed in-house, while more complex technical issues will be escalated to the software company's support team.

Where Will Support Be Located?

- **In-House Support Team:**
  - Located onsite at the Waco Animal Shelter, this team will provide immediate assistance during business hours and for critical system issues.
- **Software Company Support Team:**
  - Offsite, possibly in different time zones, which requires clear communication channels and agreed-upon response times.

Support Hours

- **Business Hours Support:**
  - The in-house team will cover standard business hours, aligning with the shelter's operating hours.
- **Extended Hours Support:**
  - Depending on the criticality of the system and the activities of the shelter, extended hours or on-call support may be established.
- **24/7 Support:**
  - For system-critical issues that could impact the welfare of the animals or the operation of the shelter, a 24/7 support hotline may be provided by the software company.

Understanding the Costs of Support

- **Cost Analysis:**

- A detailed analysis will be conducted to understand the costs involved in providing various levels of support.
- Based on the analysis, a decision will be made to balance the need for support with the available budget.

- **Service Level Agreements (SLAs):**
  - SLAs will be defined to set expectations for response times and issue resolutions.
  - The costs associated with varying levels of SLAs will be presented to the client for approval.

Detailed Support Plan

1. Support Infrastructure Setup
   - **Tasks:**
     - Establish a ticketing system for tracking issues and resolutions.
     - Set up communication tools for the in-house and software company support teams.
   - **Timeline:** To be operational by the start of the Go-Live Support Phase.
2. Training the Support Team
   - **Tasks:**
     - Train the in-house support team on system functionalities and common issues.
     - Coordinate with the software company to train on complex system issues.
   - **Timeline:** Concurrent with the Training Phase.
3. Support Transition
   - **Tasks:**
     - Gradual transition of support responsibilities from the implementation team to the in-house support team.
     - Establish protocols for escalating issues to the software company.
   - **Timeline:** Begins during the Post-Implementation Review and finalized by the end of the 90-day support window.
4. Support Evaluation and Adjustment
   - **Tasks:**
     - Monitor the effectiveness of the support operations.
     - Adjust support plans based on issue trends and staff feedback.
   - **Timeline:** An ongoing process with formal evaluations at 30, 60, and 90 days post-implementation.

By providing a comprehensive support operations plan, we try to ensure that the client is fully aware of who will be providing support, where they will be located, the hours of support, and the associated costs. Transparency in these operations will help build trust and ensure a successful long-term partnership.

Contacts

For General Inquiries and Shelter Operations

- **Director (Overall Project Sponsor)**
  - **Name:** Doris Amello
  - **Role:** Strategic oversight and decision-making for the shelter operations.
  - **Contact Information:** [Doris's Email], [Office Phone Number]

For System and User Support Issues

- **Office Manager (Primary Client Contact)**
  - **Name:** Fred Gonzalez
  - **Role:** Coordination between shelter staff and the implementation team, first point of contact for system issues.
  - **Contact Information:** [Fred's Email], [Office Phone Number]

For Training and Volunteer Management System Use:

- **Volunteer Coordinator**
  - **Name:** Courtney Patel
  - **Role:** Coordination of volunteer training sessions and issues related to volunteer management system usage.
  - **Contact Information:** [Courtney's Email], [Office Phone Number]

For Operational and Technical Issues:

- **Operations Manager**
  - **Name:** Elvis March
  - **Role:** Oversight of system operations and escalation of technical issues.
  - **Contact Information:** [Elvis's Email], [Office Phone Number]

For Adoption Process Management and User Issues:

- **Adoptions Coordinator**
  - **Name:** Annie Nguyen
  - **Role:** Point of contact for issues relating to the adoption process management system.
  - **Contact Information:** [Annie's Email], [Office Phone Number]

For Facility-Related Technical Support:

- **Facilities Technician**
  - **Role:** Addressing physical infrastructure issues that may affect system operations (e.g., power, networking).
  - **Contact Information:** [Technician's Email], [Office Phone Number]

Emergency Contact Protocol

- **Procedure:** During business hours, contact the Office Manager for immediate assistance. For after-hours emergencies, a designated emergency contact from the technical support team will be provided.

Notes for Client

- The Director, Doris Amello, should be contacted for strategic and high-level issues only.
- For day-to-day system issues or immediate assistance, Fred Gonzalez, the Office Manager, is the primary contact.
- Volunteers, Janitors, and Groundskeepers do not have roles in system support and should not be contacted for such issues.
- Contact details specific to the software company's support team will be provided separately, including hotlines for critical support and technical issues.