# **Capacity Building Planning Worksheet (Team work)**

Team name: Greater Washington County Food Bank

Team members: Blythe Weng, Shalini Rao, Max Dunaevschi

Community Partner: Jon Schubert

Users

Who are your various types of users?

* Our main point of contact, who is also in charge of all the technical aspects of the organization Jon Schubert, the IT / Warehouse manager.
* Warehouse workers who have little experience with technology

What does each need to learn?

* IT/Warehouse manager (Jon Schubert)
  + Needs to learn how to use the system, this includes managing inventory transactions, scanning system, and report generation. Jon is currently in charge of inventory tracking. His roles include the ones mentioned above, thus it is important that he is able to complete the same tasks given the new software. Furthermore, since he is the IT manager, he is also responsible for understanding how the technological systems are working within his organization. Knowing how the software works will allow Jon to be able to update information (stock values, changing tags for food items, etc.).
  + He must also learn how to maintain the system. If he is the only technical person on their staff, all questions and issues will be directed to him after our project is completed and integrated. We will no longer be available to help maintain the system, so he will need to take that role moving forward.
  + He also needs to update the system when a new item type arrives and needs to be added to the system. The main necessity our solution is meant to address is the efficiency of shipments and distributions. If this preliminary task is not implemented correctly, the effect of our solution is diminished.
* Warehouse workers
  + Need to learn how to use scanning devices (the only job Jon specified that will not be done by him). They are the main point of contact with the actual inventory. They will be responsible for scanning items as the food bank receives them, as well as deducting from inventory counts when they add items into a distribution assembly. They need to be properly trained on how to use the scanning device, as well as how to correct mistakes in case of errors. For example if they accidentally deduct too many of a specific item, how to adjust the value.
  + Potentially where to place UPC. Jon can eventually teach the employees how to place bar codes on the new inventory items, however, this is something that would be done on his end.

What steps will you take to help them learn?

* Create a guide going over all of the things needed to use and set up the implemented solution
* Provide all customer support information for the new systems - categorizing best source to contact for different issues
* Provide training to Jon on how to use the software system.
* Create video tutorial for warehouse workers on how to use the scanners

Development

Who will be the ongoing developer(s) for your solution?

* The IT/Warehouse manager Jon

What do they need to learn?

* How to set up the scanning system, create new UPC codes, troubleshoot issues that may arise, set up new scanners, download data so that he can then transfer to excel and finally to QuickBooks.

What steps will you take to help them learn?

* Create a guide with detailed instructions and little technical jargon that is easy for a non-technical person to understand.
* Link any technical support resources/contact in a single document that is easy to access
* Train him on how to use the software and scanners. The training would be done via Zoom call in which we show him the exact steps on what to do. Also, we plan on recording a video so that he may watch on his own time if he ever forgets or to be shared with other workers who may need the information later on.

Infrastructure

What will the owner of the solution need to provide as infrastructure?

§ Budget? - The monthly/yearly subscription to the software (<$50/month estimate)

§ Hosting? - Cloud based storage provided by the software. In a worst case scenario, they also have their in house local storage on a server that could be used. This is not ideal obviously, but is just a fallback option.

§ Policies (use policies, job descriptions)? - Taskflow of approval by Jon and submission of final reports to bookkeeper to be put into Quickbooks. The scans are put into a holding queue to be approved by Jon on desktop. At the end of each quarter, reports will be pulled from the software to be transferred to QuickBooks by the organization’s bookkeeper.

What outside support may they occasionally need?

§ Kind of support? - Possible issues that may arise while using the software may need to be fixed. This is why we plan to provide a list of resources that Jon can use to help him solve these issues

§ Required experience of that support? - Someone very familiar with the software solution. This includes the technical support team working specifically with helping clients debug/fix any issues with their software

What steps will you take to help them develop that infrastructure?

* Help with setting up the software and scanners
  + This means purchasing and installing the software onto a desktop
  + Downloading the scanning application onto a phone
* Testing how to create upc barcodes for various different food items. This includes creating a few upc’s and scanning them to ensure that the information that appears is correct and the system is able to accurately correct invoices.
* Ensuring that the scanning system is working properly and able to create invoices and connect to inventory