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Educational Report for 6223 Strategic Planning IDT Programs Project

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Abstract:

The Butterfield Trail Village (BTV) technology project required extensive preparation to reach a plan that would address their technology vision statement, the needs analysis, and perceived budgetary constraints. Management of the planning group was a challenge, as well as the development of an appropriate plan for their needs. Additionally, it was a dilemma to devise an evaluation that would be useful and easy to follow from the first day of use through the next three and a half years and into the future. During the project I gained valuable experience in management and evaluation that can be applied in future career opportunities.

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Project Description

BTV is a retirement community that provides full term care. There are 300+ residents and 80+ staff. BTV is constructing additional buildings to help accommodate expanding needs. It has been decided that among the new construction, they would like to create a new 'Town Hall' room for large group meetings, performances, and other occasions requiring seating for 100+ residents. Also in the plans is a conference room that will allow the various committees to communicate with other business contacts off-property via telepresence.

In order to assist with planning the technology that would be needed for the two new rooms and their desired functions, a planning group was formed. The members of the planning group consisted of Bill Wickizer, the administrator of BTV; Riki Stamps, the Program Director who deals directly with the day-to-day operations of the facility; and Dr. Joe Musacchia, a resident on the Resident Planning Board.

In accordance with procedures detailed in the class, the planning group first developed a technology vision statement about how they see technology relating to and helping them in their lives. Following the vision statement, a technology evaluation was preformed in order to gauge the existing status of the technology and how much could be repurposed in the new facilities.

Following the evaluation of the existing conditions, a needs assessment was performed in order to understand the requirements of the new systems to be

purchased and installed. The needs assessment consisted of a question and answer session with the stakeholders and a survey of the residents.

Once the needs assessment was tallied and compared to the evaluation of the existing equipment, the action plan was researched and formulated. It listed, with pricing current to the date, all of the equipment necessary to fulfill the results of the needs assessment. Two detailed budgets were presented – one was a state-of-the-art estimation and the other more clearly reflected the requirements determined by the needs assessment.

Encompassed in the action plan, an implementation plan was developed around the final placement and requirements of the equipment (such as network cabling and electric power needs) so that all considerations were planned for during the construction of the facilities. In conjunction with the network and power requirements of the equipment, the research that was conducted only considered solutions that would work within the physical and budgetary constraints.

After the action plan was devised, the evaluation of the plan was the last essential step. The evaluation plan suggested four separate methods to determine the success of the project. Each method was scheduled to occur at different intervals throughout the next three and a half years so as not to overwhelm the staff and residents, and also to give them ample opportunity to be involved with the appraisal of the plan's success.

Program Identification

This project was chosen for inclusion in the portfolio on the basis that it is a good demonstration of management and evaluation. There were different examples

of management in relation to the BTV project. One such example was the management of the planning group. As the group leader, I was responsible for coordinating all communication, scheduling of meetings, managing time, and keeping the group on task. Often it was necessary to communicate reminders about upcoming meetings through each person's preferred method of contact.

Also time management was important; two lines of research were pursued (the state-of-the-art vs. the actual needs revealed by the analysis). This led to an increase of research, a need for justification of one choice over another, and a contingency plan for the possibility of changing equipment in the overall layout and placement of components.

Another example of management was the accounting for the future administration of the ongoing evaluation. The program director consented to assume the roll of the plan evaluator in the future, but the system had to be constructed in a way as to meld with her current duties, not cause her too much extra work (or it would not happen), and yet still provide valuable data from this project to carry forward into future projects.

A final example of management was the coordination of the installation of components. Everything would have to be settled before building construction started. Planning helps avoid last minute and expensive corrections. For instance, it was important to know that the placement of the network and power cables needed to be considered before the walls were finished, and the placement of the ceiling projector was not behind a roof support pillar.

The example of evaluation that this project portrays is that of a balance between usefulness and ease. It may not seem that four different methods of evaluation would be easy; however, the methods are staggered in intervals over the course of more than three years and there is only one evaluation method occurring at any one time. There is a mixture of survey, multi-criteria analysis, case study groups, and SWOT evaluations.

Each one addresses different members of the BTV *family* – residents, staff, and administration. The surveys, multi-criteria analyses, and case studies, all feed information into the SWOT evaluations to make them the most useful and comprehensive of the four methods. Based on the SWOTs the plan can be altered to better follow the collective will of all of the stakeholders.

Educational Reflection

This project brought many educational challenges that are not presented in common textbook examples. One such challenge was discerning the difference between what the stakeholders think they want and what they really need. The needs analysis can be a convincing tool; however, when dealing with technology there is the additional problem of wanting the bells and whistles extra features versus investing the time to learn how to use them. Often people want technology that they are not willing to invest the time in learning how to use. Multi-tiered training was suggested and written into the plan; there would be two or three people that would know the entire systems, and they would train others throughout

the staff, and in turn those staff would help the residents learn what they needed to know.

Along those same lines, the planning group was difficult to manage because they had an idea of what they wanted, but no desire to analyze and plan how to get results. They were not very interested in the steps leading to the conclusion. I had to guide conversations and meetings to address the steps of the plan and to avoid them just skipping to the end.

Another problem when working with a planning group is communication. Even though multiple modes of communication were accommodated for, (i.e. onsite meetings, email, and phone calls) it was still difficult getting four people together at one time bi-weekly, or monthly.

Additionally, it is difficult to get useful results from a voluntary survey. Out of more than 300 residences, only six returned surveys. I should have planned for additional methods to query the residents.

In conjunction with helping people understand all of the steps necessary to correctly plan a large scale project, an important lesson learned was that the slowing down allowed the stakeholders to fully consider the needs and implications of their plan and not hurriedly throw money at what the think will solve a problem only to find out later that the true need was not addressed.