Information Systems Management
Course 95-822

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Final Consulting Report

Northside Leadership Conference

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Student Consultant, Ankit Jhaveri
Community Partner, Eric Milliron

I. Background Information

North Side Leadership Conference states its mission as:

"The Northside Leadership Conference is a coalition of Northside community-based organizations, committed to addressing mutual concerns through a united approach in order to promote and enhance the vitality, quality of life and image of Pittsburgh's Northside." (*http://www.pittsburghnorthside.com*)

Northside Leadership Conference consists of a team of 11 people, working towards the organization's mission. In order to meet this mission, the organization considers the following programs:

Planning and Advocacy:
In an attempt to work towards the welfare of Northside, the Northside / North Shore Planning Committee serves as a common platform where major stakeholders discuss with community members major development projects.

Residential Development:
The Department of Residential development program offers assistance for the development of the residential projects in around thirteen neighborhood areas in North Side. This assistance forms an essential part or element for the development of peaceful residential areas.

Commercial development:
North side Leadership Conference, through its Economic Development component, City Shops aims at fulfilling the basic needs of business neighborhoods while providing a regional destination through its tourist industry.

II. Consulting Tasks

Since data and project management is a crucial issue at Northside Leadership Conference, it is important to implement a solution that will look at the various issues dealing with the management of project details. The organization has a number of projects that are handled by different people in the organization. To keep everyone on the same track and update them about the status and deadline of every project. As identified by the community partner and the student consultant, the major tasks assigned during the rime duration of this project can be stated as below:

Task 1: Reports for non-integrated and disorganized data about projects

Task 2: Presenting a detailed timeline representation of every project managed.

III. Outcomes Analysis and Recommendations

Northside Leadership Conference implemented an entirely new system and method to track the project details and duties assigned to various team members. Since there are a number of projects at Northside Leadership Conference going on at given point of time, it is very difficult for all members in the organization to track the status of a project during the weekly meetings, particularly since there is no common format followed by everyone. The outcomes can be listed as follows:

1. Preparing an overview of all projects.
   - All the information is stored online, where members update regularly and only a single printout is needed which is distributed among all the members of the organization
2. Reviewing deadlines and list of tasks needed in every project.
   - Since the projects are updated regularly and the due dates are modified constantly, the process to get deadlines has become very fast and efficient by using this technique.
3. Presenting a common formatted output before every meeting.
   - By implementing this software, only a single printout of the task list at airset.com was needed. The project details can be covered through the Microsoft Project printouts.

Since a detailed analysis of every project needs to be supported with the summary of the projects being taken care of, Microsoft Project is implemented and the outcomes are listed below:

1. A detailed analysis of a project.
   - Each project can be easily tracked since every project has a parent task followed by a few sub tasks. The entire structure is represented as a tree.
2. Graphical representation of the status of projects.
   - The outline of a project helps comprehending a project easily by viewing the timeline and analyzing a project through a graphical representation.

3. Constantly tracking and updating duties assigned to members.
   - Through this application, the members could clearly the allocation of duties among various members.
4. Linking tasks and identifying predecessors.
   - By adding predecessors and linked tasks, the timeline adjusts itself and represents the project deadline effectively.

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I. About the Organization

Organization

North Side Leadership Conference states its mission as:

"The Northside Leadership Conference is a coalition of Northside community-based organizations, committed to addressing mutual concerns through a united approach in order to promote and enhance the vitality, quality of life and image of Pittsburgh's Northside." (http://www.pittsburghnorthside.com)

Northside Leadership Conference located in north side aims at developing the area of north side of Pittsburgh through commercial and residential projects. Northside Leadership Conference covers fourteen neighborhood areas in the north side and has some prominent partnerships with organizations such as Allegheny General Hospital, Heinz, Giant Eagle, United Parcel service and Oliver High School.

Location and Facilities

Northside Leadership Conference is located on sixth floor of the East Common professional building at 4 Allegheny Center in the north side of Pittsburgh. It is a well maintained and self sufficient office with a cubicle for every staff member. Each cubicle has most of the basic amenities and a personal computer that helps staff members to work individually. It has a central reception area and 2 conference rooms. One of the conference rooms is larger than the other. Most of the weekly meetings are conducted in this conference room. All the cabins are in a line and around 30 to 40 square feet each with a computer and telephone. The reception is in the center and the cabins surround it.

Programs

Planning and Advocacy:
In an attempt to work towards the welfare of Northside, the Northside / North Shore Planning Committee serves as a common platform where major stakeholders discuss with community members major development projects. The Committee mainly consists of residents and business representatives who interact regularly with the Department of City planning, the Urban Redevelopment Authority, The Sports and Exhibition Authority, Port Authority and North Shore Developers.

Some of the plans drafted are below:
- Underpass improvements
- Development of the North Shore Connector
- North Shore Intermodal Transportation Center
- North Shore Development to resolve common issues such as noise, parking traffic etc.

Residential Development:
The Department of Residential development program offers assistance for the development of the residential projects in around thirteen neighborhood areas in North Side. This assistance forms an essential part or element for the development of peaceful residential areas.

The Conference now has a Senior Project Manager, one full-time Project Manager, and a Real Estate Marketing Manager working under the supervision of the Director of Residential Development.

With all of the progress made this year, the Department of Residential Development looks forward to even greater accomplishments in the year to come. The Conference anticipates the construction start of two new projects, one in the community of Fineview and one in Troy Hill. The active marketing of all of our residential developments results in the attraction of new Northside homeowners, an expansion of the tax base, and improved housing conditions throughout our neighborhoods. By offering our member communities a diversified range of housing products, we continue to make the Northside a better place to live.
(http://www.pittsburghnorthside.com)

Commercial development:
North side Leadership Conference, through its Economic Development component, City Shops aims at fulfilling the basic needs of business neighborhoods while providing a regional destination through its tourist industry.

As the heart of a neighborhood, local business districts play a vital role in creating jobs, sustaining households, providing convenient goods and services, and generating tax

revenue for the City. As the Economic Development program of the Conference, the mission of City Shops is to strengthen and rebuild the commercial corridors located on the North Side of Pittsburgh. It is our challenge to continue to provide services that enhance local neighborhood business district economies and therefore affect the overall quality of life for business owners, employees, residents and visitors of the North Side. City Shops encourages the following principles of development:

- provide new opportunities for business growth, services and attractions
- provide employment opportunities for local residents
- preserve the distinct and unique character of each of the North Side business districts
- promote an area of high environmental and cultural value
- encourage quality design and smart urban land use development
- activate our streets and increase pedestrian traffic
- promote a positive image of the North Side

City Shops encourages collaboration between business owners, community groups and stakeholders to spur private development in both residential and commercial areas. City Shops serves the following ten business districts to implement individually tailored revitalization initiatives: Allegheny West, Brightwood, Brighton Heights, Central North Side, East Allegheny, Observatory Hill, Perry Hilltop, Spring Garden, *Deutschtown* and Troy Hill. City Shops assists these districts in seven major areas including:

- Small business recruitment and retention;
- Promotion and marketing;
- Architectural design and physical development;
- Urban planning and infrastructure improvements;
- Commercial real estate development; and,
- Organizing business communities.

(http://www.pittsburghnorthside.com)

Staff

Mark Fatla, Executive Director – He is in charge of administration, fundraising, and oversight of all program areas (housing, business development, job training, community relations)

Eric Milliron - Director of Business Development –He is in charge of all commercial real estate and business development along East Ohio Street and Western Avenue.

Miranda Spiro – She is in charge of Elm Street (residential) programming

Joey-Linn Uhlrich – She is in charge of community/business relations with Allegheny General Hospital.

Jon Huck, Project Manager -He manages construction of Housing on North Side.

Kelly McKay, Adm. Asst. – She handles secretarial duties.

Randy Lareau - Workforce Development Coordinator - She manages workforce and job training programming

Rhonda Brandon - Public Safety Coordinator- He manages public safety initiatives for the North Side Leadership Conference.

**Christina Schmidlapp, Allegheny Commons Coordinator**- Deals with fundraising for restoration of Allegheny Commons Park

Chris Sandvig, Intern – Works on developing social enterprise venture

Name of Staff member	Microsoft Word	Microsoft Excel	Microsoft Access	Microsoft Powerpoint	Microsoft Outlook	CRM products (Salesforce, FreeCRM etc.)	Microsoft Project	Web applications (Eg.Google Calendar etc.)
Eric Milliron	√	√		√	√	√		√
Miranda Spir	√	√		√	√			
Jon Huck	√	√	√	√	√		√	√
Joey- Linn Ulrich	√	√				√		√
Randy Laruea	√	√		√	√			√
Rhonda Brandon	√	√						
Mark Fatla	√				√			
Kelly McKay	√	√			√			√
Christina Schmidlapp	√	√						
Chris Sandvig	√	√		√	√	√		√
Amanda Vista	√	√		√	√			√

Technical Environment

Northside Leadership Conference is currently well equipped with technology. Most of the computers are Pentium 3 or above and are upgraded regularly based on the system needs. Each staff member has a computer and all the computers are connected to each other through Local Area Network. There is a central server that takes the data from the central

shared drive and updates the system everyday. Some cubicles have a personal printer will the others use the central printer. Besides 12 computers there are 2 laptops. Each computer also has access to high speed internet connection. This can be shown through the diagram below:
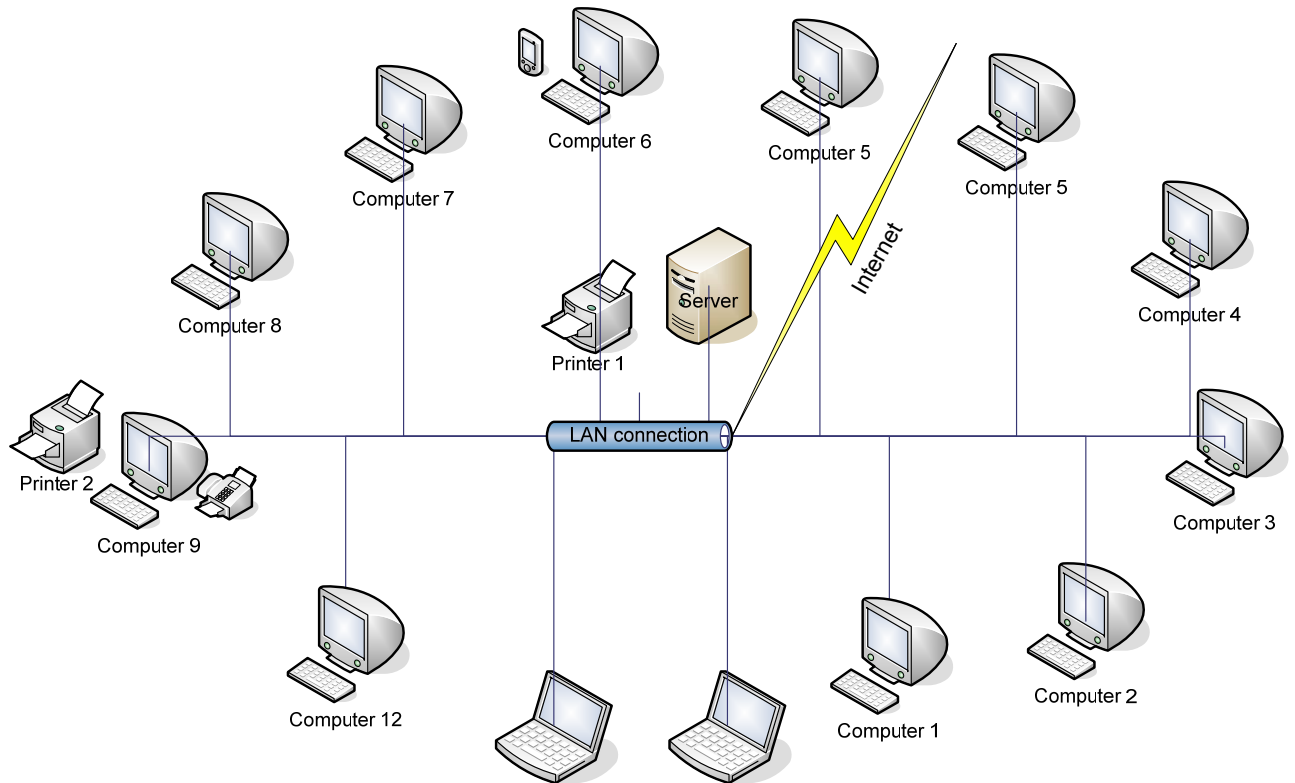
The basic technology environment details can be specified as follows:

Type: 12 computers, 2 Laptops and 1 server. They are primarily Compaq computers.
Hardware: Pentium III or Pentium IV processors, sound cards, 10/100 Mbps network card for connecting to the Local Area Network.
Drives: A central shared drive, CD- Rom drives on some while the others are equipped with DVD-ROM
Peripherals: The monitor sizes range from 17" to 19" CRTs. Most of the computers have a CRT monitor except 3 computers which LCD monitors.
Printers: Epson Stylus and HP printer
Networks: Local Area Network (LAN) connected to the central server.
High Speed Broadband Internet Connection
Operating Systems: Microsoft Windows 98/ Windows XP

Software: Microsoft Outlook, Microsoft Word, Microsoft Excel, Microsoft, Adobe Acrobat Reader, Internet Explorer.

Technical Management

Staff members at Northside Leadership Conference exhibit varied technical knowledge; some being interested in technology while the others being less interested in it. Eric Milliron is interested in technology and tries to find solutions that can help or simplify and reduce paperwork.

Downtime, Repair and Maintenance:

Pat Hurley is an external contractor responsible for the maintenance of technology. He is hired when a system problem occurs or an update is needed.

Pat is responsible for the following duties:

- Repairing and maintaining a computer when it is down.
- Maintaining network connections between computers.
- Updating computers and laptops periodically.
- Repairing and maintaining the central server.
- Preventing computers from external factors such as virus etc.

Website:

The website maintenance is given to a third party. Since the website is not actively used by the members, it is not updated regularly. The link is http://www.pittsburghnorthside.com and may need some more attention for the features of a fully functional website.

Backups:

Since the central server plays a vital role and members need the critical information on this system regularly, it is updated regularly. Besides, being updated the data is backed up every day as well. Hence, to prevent loss of this critical data, the data is backed up and maintained regularly by the server itself.

Technology Planning

Northside Leadership does not have a plan to manage technology. The plan is always made as per the requirement at that time. There is never a budget that is allocated for technology and purchases and investment in technology is made when there is a failure of a system or an urgent need is needed.

Though updates are made regularly, and the firm invests money to buy and update essential software like Microsoft Office and anti virus software, yet it does not have

budget set aside for any new utility program or a web based solution for a better operating environment.

Internal and External Communication

Internal:
Most of the internal communication is more casual and is done through conversations. But in case, files need to be shared they are done so either through Email or the Shared Drive. They currently have a Microsoft Outlook system that helps them manage and keep track of each others schedule.

External:
Most of the external communication is done through basic communication facilities present in every kind of office. Most of the verbal communication is done through the telephone, while on the other hand the written communication is done through email, fax, or post. Unfortunately, since the website is neglected and rarely used there is no interaction or very little interaction that is done through the website.

Information Management

Management of information is one of the most critical aspects for the company, since most of the data is crucial and saved on paper. Information at NorthSide Leadership Conference ranges from schedules, contacts, customer details, project information to common tasks and calendars. For example: the information managed by Eric is different from the information managed by Miranda but over a period of time it can be used in a number of areas.

Considering the number of projects that Northside Leadership Conference handles at any given point of time, the project's information and status is very important at given point of time. Currently, the projects are tracked through the sample task lists which include customer and project information and tasks. A sample document is attached in Appendix A. Northside Leadership also has a version of Microsoft Outlook that is central and can be shared with different members in the organization. Through this, members can share their contacts as well as the schedule and calendar.

II. Scope of Work

Task 1:

Reports for non-integrated and disorganized data about projects

As mentioned before, staff members at NorthSide Leadership Conference come from backgrounds with different technical expertise. Some of the people understand the importance of technology and how it can be utilized to come up with appropriate solutions while others are reluctant to use technology to save and organize data. Thus, there is always a gap between the documents prepared and the storage techniques used by these members. Information is always stored in different formats; some store them in Word documents, some in Excel spreadsheets while the others store it in project details on pieces of paper.

This leads to a problem while discussing different projects during the weekly meetings that take place. The idea of this meeting is to discuss and update everyone in the organization about the status of every project. Since the time allocated for the meeting is very little, it is essential that every member is given a summary or brief outline about all the projects going on.

Thus, it is essential to provide a single sheet including all details of a project including the deadlines and major duties left. Providing a solution that can give an overview of all projects would be a major task that we would need to look into.

Approach:
- Conducting a Requirement Analysis to understand the basic information that is needed in to summarize a project during a weekly meeting.
- Understanding the type of information that would be needed to store commonly for every kind of project. Each project is different from another project but has a few common characteristics. These characteristics should be help users to understand essential details of the project.
- Measuring the tradeoffs between online and offline storing mechanisms for an efficient system.
- Testing and realizing the role that various databases can play in providing a solution. We can also look at the various ready to use tools to start the process as soon as possible and store data.
- Measure various software performances and compare various options on the basis of performance and pricing on the basis of the existing environment.
- Using the tools with Eric and Miranda to understand their comfort level and to take a feedback on how comfortable others from the organization would be able to migrate to this new system.
- Demonstrate the advantages of technology and convince users reluctant to use technology to form a common basis for exchanging the development of an ongoing project.

- Train and help users to understand these tools over a few weeks and to leave them with a comfortable and optimal solution.

Expected Outcome:
The requirements of the expected outcome can be outlined as follows:

- A simple report of all the projects that can be comprehended easily.
- A common platform for staff members to view the status of projects and tasks remaining
- An interface that is not very different from the traditional or currently used system.

Task 2:

Presenting a detailed timeline representation of every project managed

The summary report of all the projects must also hold the details of each of the projects in that list. Since, every project includes various tasks and sub tasks, it is essential to use an application that can give all the essential and vital details by just generating a simple report. The approach and expected outcomes are mentioned below:

Approach:
- Analyzing the various attributes of a project to form tasks and sub tasks involved in the project.
- Differentiating the order of tasks and understanding the predecessors of every task.
- Measuring the time and resources required for every project and checking whether they satisfy the requirements and meet the deadline of projects.
- Assigning various duties to different people in the organization.
- Projecting and tracking the progress of a project through deadlines and a graphical interface.

Expected Outcome:
The requirements of the expected outcome can be outlined as follows:

- A simple report that holds all the essential details of a project.
- The report presented about every project should also talk about the various attributes involved in the project and the resources used in the project.
- The interface should be easy to comprehend and include essential details such as
    o Tasks
    o Deadlines
    o Graphical timeline
    o Member names to whom duty is assigned
    o Percentage of task completed
    o Deadlocks

o   Tasks that have a predecessor.

- An interface that is not very different from the traditional or currently used system.

III. Outcomes and Recommendations

Consulting Task 1:
Reports and task lists for non-integrated and disorganized data about projects

One of the major drawbacks of file system is the lack of ability to track projects and store information about projects efficiently. Data retrieval too is very difficult. Since members from the organization may deal with projects belonging to different segments independently or collaboratively, it is important that retrieval of project information is as simple as possible.

An overview of solutions offered:
1. Airset.com
2. Microsoft Project.

Features:-

- A single, connected hub to manage personal as well as organization information
- An online solution where different members from the organization can log on and access the same data together
- A ubiquitous solution to track tasks and project deadlines
- A simple modification made by a member is reflected and seen by all members in the groups
- A solution that updates and informs users through alarms and email about approaching deadlines
- The lists and tasks features provides an overview of every project being handled.
- It is a free service
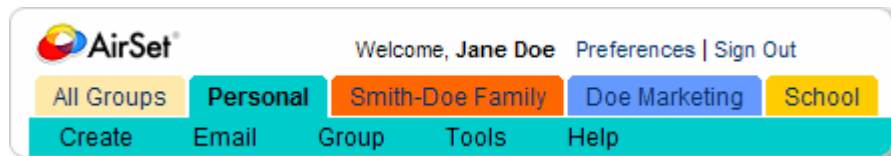
The table below represents the outcomes of the application used.

| Actions	Techniques previously used	Outcomes and benefits
Preparing an overview of all projects.	All the information was gathered manually from all members in the organization.	All the information is stored online. Members have started updating the list and only a single printout is needed which is distributed among all the members of the organization.
Reviewing deadlines and list of tasks needed in every project.	The deadlines were retrieved from various documents and different people. This generally took a lot of time before the weekly meeting.	Eric, Jon and Nancy have been using this system to add tasks and review deadlines. As Eric had mentioned, "The email notifications and reminders provided by Airset is an efficient way to track and note approaching deadlines."
Presenting a common formatted output before every meeting	Since such a list was missing initially, all excel sheets, word documents and notes had to be brought into the meeting room.	By implementing this software, only a single printout of the task list from airset.com is needed. On this system Jon Huck said, "If we need an overview we go to Airset.com and take the printout of the task list. On the other hand if we need a detailed analysis of any project, we refer to the project details entered in Microsoft Project."
Overall effect on the actions performed in terms of time.	Previously, 10 – 15 minutes were required to set up the gather and sort all the project details.	The entire process is faster and it takes just a few seconds for the online shared list to be printed.

The option of www.airset.com took sometime for members in the organization to use, yet the solution looks like one that will last for a long time. The best way to evaluate this is how people have been learning about the features of airset.com. It has been spreading among members in the organization itself.

"Eric picked up the basic features from Ankit and then showed me the same. Now, I intend to introduce this to Miranda and eventually Mark Falta. In this way, we can use the product better in the long run without assistance."

Currently only a few members are using Airset, but it will eventually be used by most of the staff members.

Shown below is screenshot of the shared online task list at www.airset.com used by members in the organization.
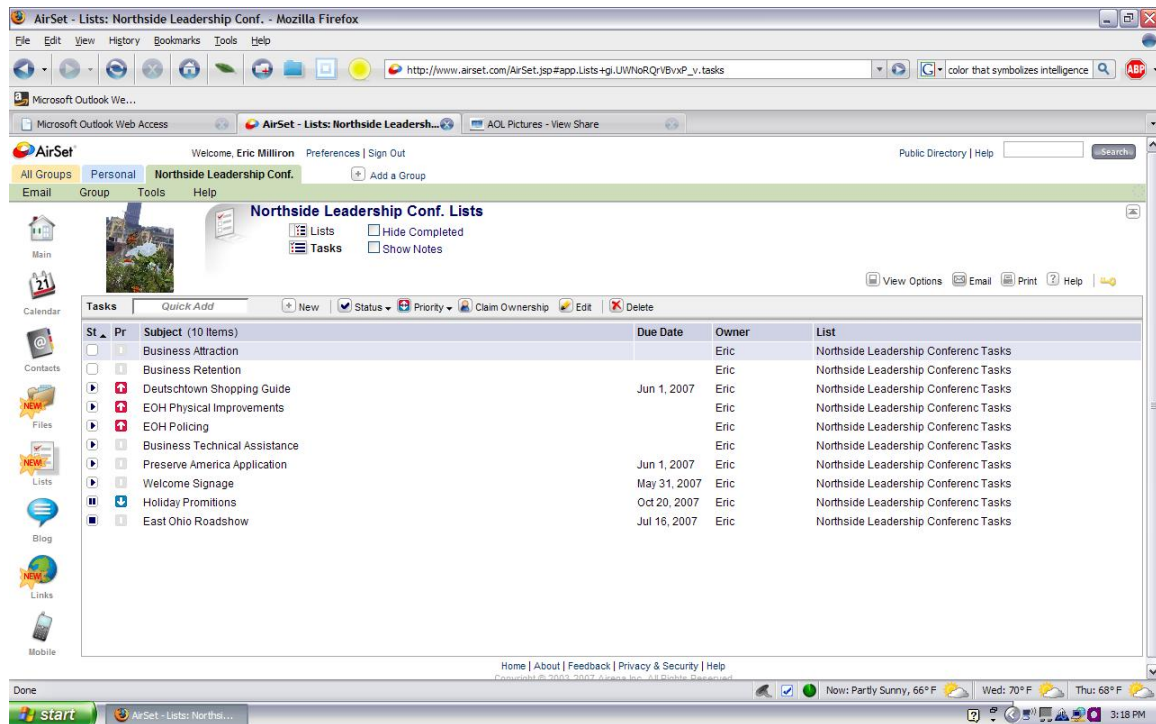
Consulting Task 2:
## Presenting a detailed timeline representation of every project managed.

Initially, there was no common platform through which projects could be discussed. This is essential particularly because when members of the organization meet together for a weekly or biweekly meeting to discuss the status of projects. "Most of our time during a meeting is lost when individual members try to gather information about the projects through their own sources." Eric had mentioned initially. This application would provide a common interface through which each individual is well informed about the project and is at a common platform to discuss different and various issues about the projects.

Members in the organization previously used Microsoft Outlook and Excel to store information about various projects, but with the ability of adding tasks directly into Microsoft Project, members will benefit greatly. Being familiar with a Microsoft environment, members can easily use Microsoft Project objects in their Microsoft Word documents. This can be done through Insert → Objects..

Eric was the first one to learn the basic features of Microsoft Project. The training was informal and practical. After a small demonstration and with a little guidance, Eric was able to design his first project. As the project only included the duties that Eric takes care of in a project, we moved to Jon Huck to train him and add his tasks to the Microsoft Project file. By using this technique, a concrete Project timeline has been developed, by using inputs, constraints and details from both the members. This has been an iterative process and the tasks have been modified after reviewing. Jon and Eric understand the basic features of Microsoft Project and can teach the others easily. As Eric had mentioned, "Though Microsoft Project is complex and can do a number of things which we do not need currently, yet it can be used with the basic features. Jon and I believe that this software can do more in the future. If we want to we can train people for the basic features in future as well."

The following is screenshot of the fist project created.
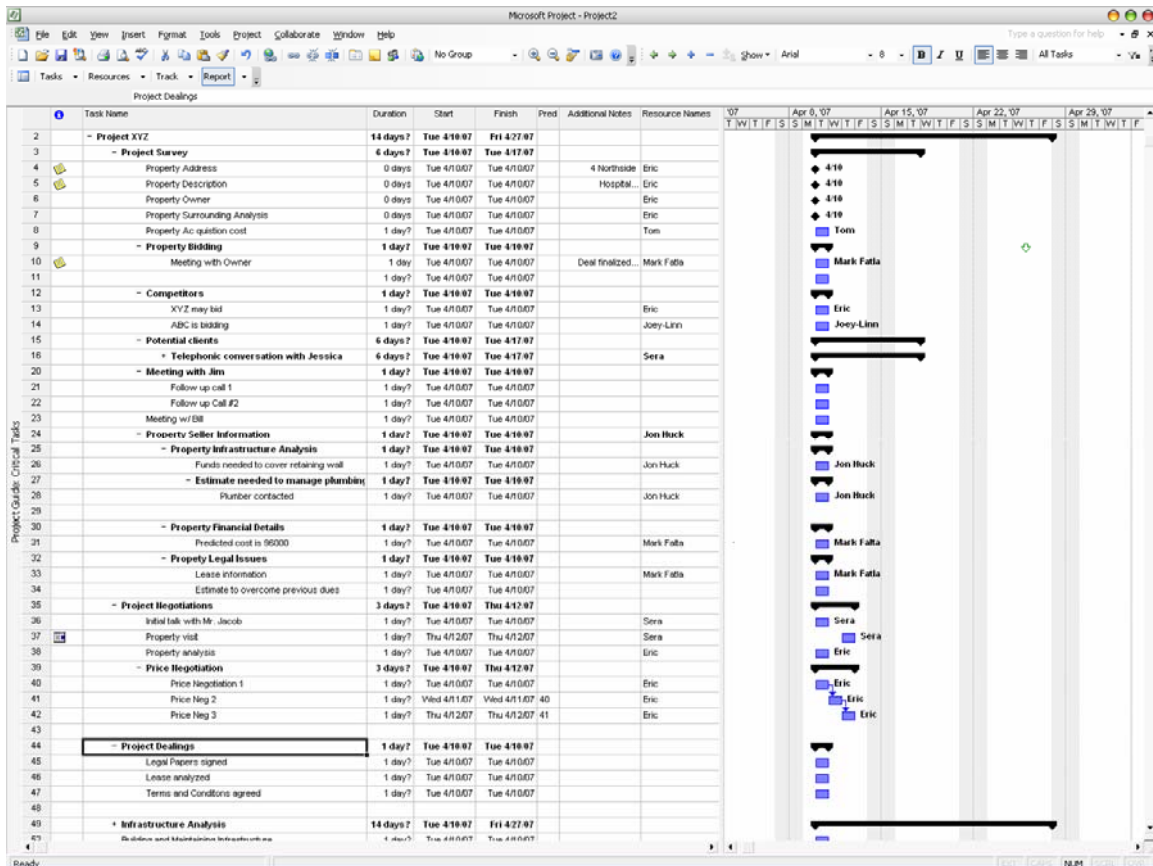
"The ability to track the progress of a project graphically will be greatly beneficial," was mentioned in one of the meetings. Since Microsoft Project has the ability to display the

progress of a project graphically, members find it convenient to track projects rather than going through all the papers to determine the outcome and status of the project.

Microsoft Project holds features that can ease data retrieval and holds the ability to outline the status of any project. Thus, by looking at the timeline of the project and verifying the jobs assigned to members it is very easy to understand the status of the project and the duties assigned to members.

Actions	Techniques previously used	Outcomes and benefits
A detailed analysis of a project	This was generally done through Task lists made in Microsoft Word	Each project can be easily tracked since every project has a parent task followed by a few sub tasks This entire structure is represented as a tree. Eric and Jon find this easy to comprehend, yet they believe that the software can get complex sometimes, since it has a large number of features.
Graphical representation of the status of projects.	There was no application or technique being used to measure the progress of a report graphically.	The outline of a project is a better and helps comprehending a project easily by viewing the timeline and analyzing a project through a graphical representation. Now, the timeline review itself is enough to give a good understanding of every project.
Constantly tracking and updating duties assigned to members	The sheets used previously did not have any clear indication of the tasks and duties assigned to a particular person.	Through this application, the members could clearly the allocation of duties among various members. This feature has increased their efficiency while tracking members to whom each task is assigned.
Linking tasks and identifying predecessors	Previously, all the tasks were in an excel sheet or a word document. The tasks were not represented as linked on charts.	By adding predecessors and linked tasks, the timeline adjusts itself and represents the project deadline. This feature provides them a basic outline of tasks that need to be completed before the dependent tasks.

The number of people willing to adopt this system is an indication of the feasibility and success of this solution. The response has been interesting and members in the organization agree that this could be an effective way to track projects. Though, the number of people familiar with Microsoft Project is few, yet it shall be a feasible and widespread solution once more people adopt to it.

One of the biggest challenges of this software is its complexity. Microsoft Project can do a number of things and has a number of features. This happens to be a drawback when people with little technical knowledge start using it. The software may look intimidating and complex, thus preventing a number of people from using it.

There is a risk while using this software but the ease with which Jon and Eric picked up the basic features evaluates that many others in the organization could pick it up easily as well.

Recommendations

Vision:

Northside Leadership Conference is constantly striving to reach its mission. The journey can be faster if they organize and evaluate their methods and information. Technology is one the basic and primary ways this can be achieved and hence Northside Leadership Conference believes that investment in terms of time, money and human resources in technology would eventually lead to an efficient system to reach their goal. Considering the number of projects that Northside leadership handles, the use of technology can certainly help staff and team members to add data and interact during meetings on a common platform. The plan is to use the software on a single computer or workstation, where the community partner can use it and evaluate its benefits and update the status of a project to keep a constant check on the deadline. Microsoft Project holds the ability to transfer reports among different users electronically as well as update members instantly. As it can be understood, team members at NorthSide are currently working on a number of different projects and use their traditional methods to track projects. Thus, it would be unfair to expect team members to switch to a new system or application immediately, but as members in the organization get familiar with the process, the software can be upgraded and utilized better. One of the recommendations is an attempt to integrate Microsoft Project with Microsoft Outlook more efficiently. Though currently, tasks can be added from Microsoft Outlook and imported to Microsoft Project, it would be worthwhile to use a software package that can help them add tasks in structured manner in Outlook and then export it to Microsoft Project. Something that would also be very useful for members would be using templates more frequently in Microsoft Project. Another recommendation would be to use the internet to provide solutions by using online applications that can help them integrate information. Applications like Salesforce can be beneficial since the data and information is available to members irrespective of where the member is. These recommendations will help NorthSide handle the progress

of their projects at a higher level. These recommendations would add value to the technology being used and assist Northside in reaching its mission statement.

Recommendation 1: Adding and using templates

Overview:
Templates form a good framework to follow while preparing a document or plan. Projects can vary and could be of different types, but majority of them follow a similar format. Taking advantage of the fact, that though the content is different in each project yet the basic framework is similar, templates can be useful. The framework can be a timesaving process while working on a project with similar steps and requirements.

Details:
The projects handled at Northside Leadership are to similar to great extent. For example, most of the projects have common steps such as property analysis, customer deals, negotiations and legal issues. Though the steps and content within each of them are different, using common templates will help users to simply modify the contents and use the templates more efficiently. Microsoft Project comes with a few built in templates and there are many available online, but the beauty of the software is the ability to save templates and use them again in the future. This stored master framework or template would also provide a guideline while tracking or marking the progress of various projects being designed in the future.

Reasons behind the goal:
There a high number of projects going on simultaneously at Northside Leadership Conference. Each one has a few things in common, and thus there is a good scope to cut off the redundant work of creating similar projects in Microsoft Project every time.

There are 2 major reasons how this can help manage projects better. They are stated below:
- A reduction in the amount of redundant work that would be required every time a new project is created.
  For example: The property evaluation of a residential and commercial property would have some tasks (negotiation, deals, legal formalities etc.) common among all projects. A template would be a useful solution.

- The framework would give users a better path or guideline to follow to fill details about a project. This framework would add accuracy and completeness to any project being developed.
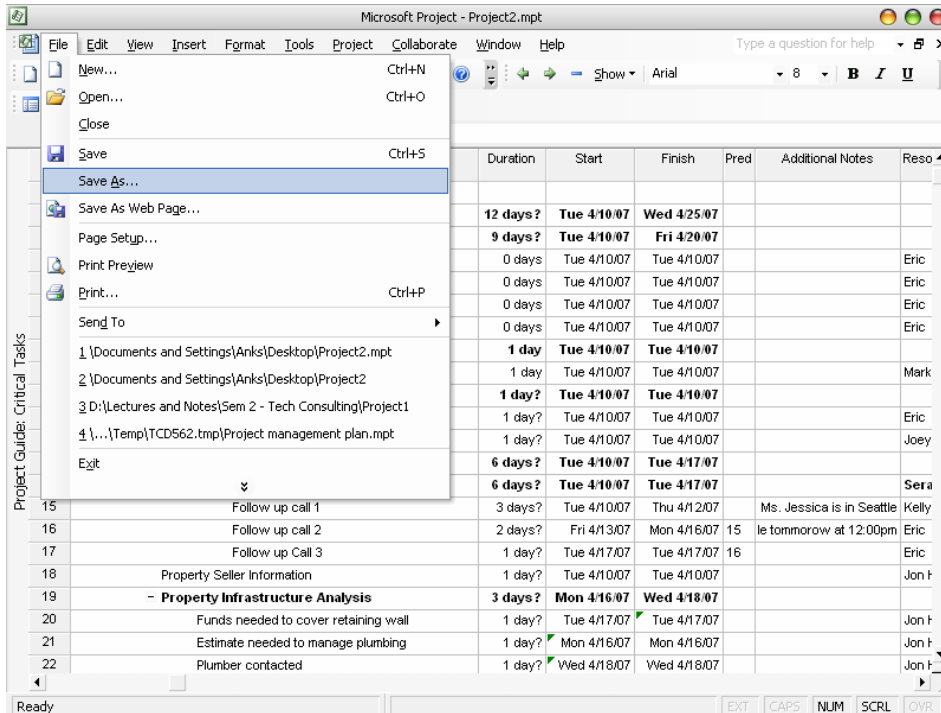
Approach:
1. Introduce and make sure users are comfortable using Microsoft Project.
2. Use sample templates that come default with the Microsoft Project package.

3. If any of the templates is similar to the project layout, use it.
4. Find templates online at http://office.microsoft.com/en-us/templates/FX100595491033.aspx?pid=CL100632981033
5. Another alternative is to prepare the basic outline of a project and save it. This can be done using the following steps.
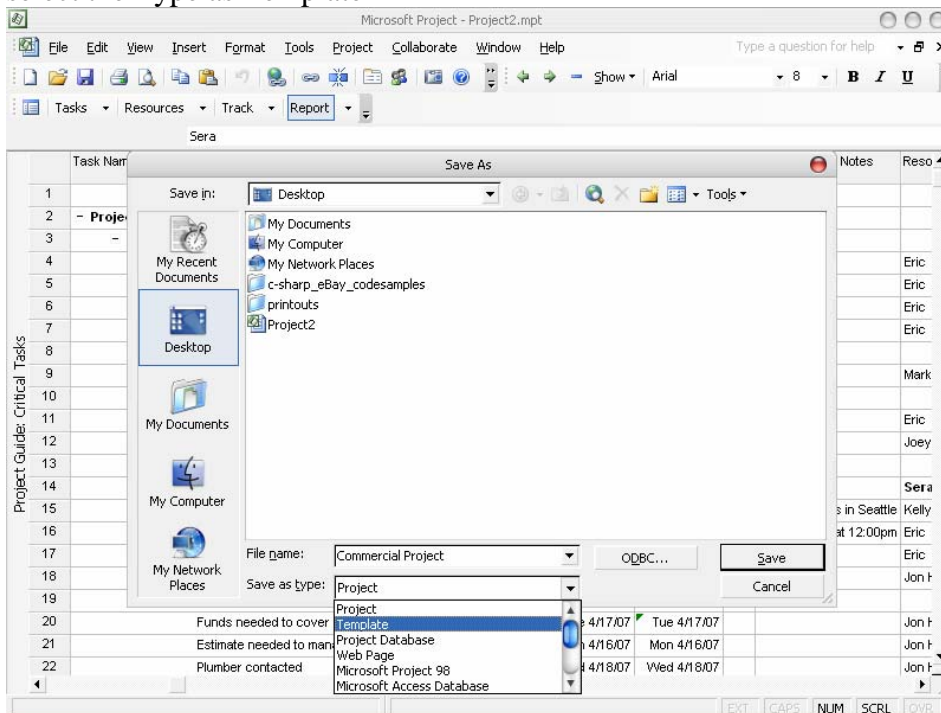6. Prepare a basic project outline or sample outline.

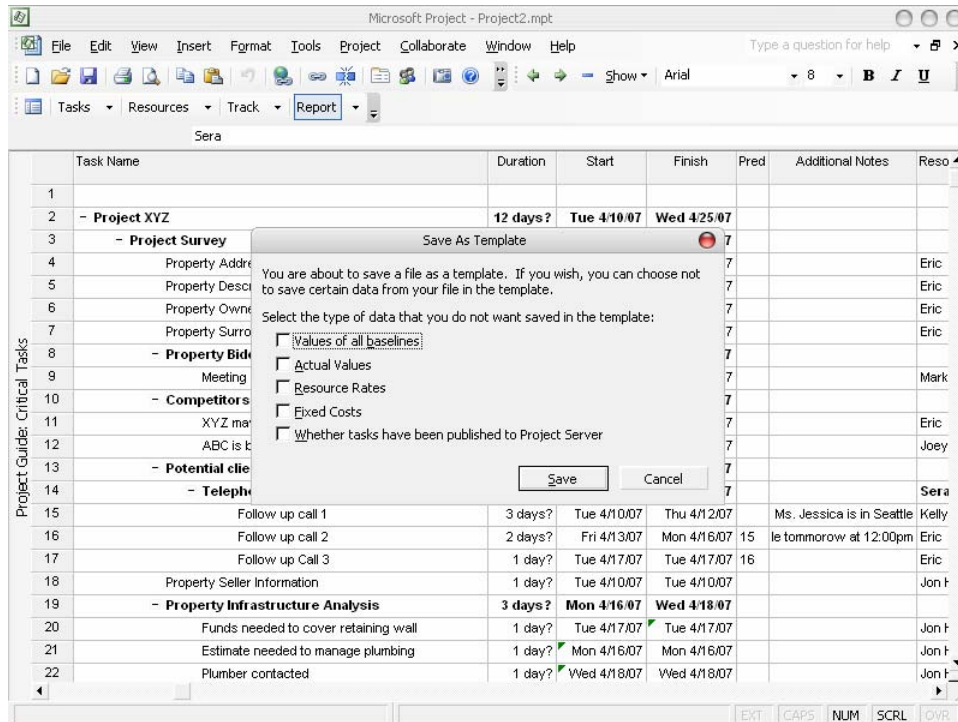
7. Save the project by following the path File → Save As…

8. Enter the name the Project. For example: Commercial Property Project and select the Type as Template

9. On clicking the save button a dialog comes up. Select the appropriate values if needed or leave the checkboxes empty and click on 'Save'.

Outcomes

- Reduction in redundant work.
- Increased efficiency in preparing project details.
- Increased focus due to the presence of an outline or framework to follow.

Internal Resources:

- Functional version of Microsoft Project.
- At least one member must hold the ability to create a decent project outline.
- The ability to follow and modify templates if needed by members using the template.

External Resources:

- The Microsoft Project template website: http://office.microsoft.com/en-us/templates/FX100595491033.aspx?pid=CL100632981033
- **Bloor Research: IntaChange from Intasoft - Web-based Change Management Software** – A case study on Web-based Change Management Software with indepth Microsoft Project Integration
- http://www.vita.virginia.gov/projects/cpm/templates.cfm - An excellent resource for various types of templates.

- http://zo-d.com/blog/archives/examples/microsoft-project-2007-example-project-templates.html - A good resource for Microsoft Project templates.

Budget:
- Cost of buying readymade templates available on the internet.

Recommendation 2: **Implementation of online solutions**

Overview:
The projects being handled at Northside Leadership are surely going to increase over a period of time. Thus, the challenge of tracking projects is likely to increase as time passes. With essential data at stake, it would vital to store and back up data constantly. Thus online solutions are good solutions, since they reduce this burden and risk to a great extent. Another important feature would be ubiquitous data, (i.e. the ability to retrieve data from any location). This is particularly useful for members when they are traveling or not present in the office. With data available online, it could ensured that their work is not stalled due to this limitation.

Since the application and service is expensive and may not be needed now, but this is surely a recommendation one must consider in the long run.

Details:
A number of online solutions are available to solve the above mentioned problems. By using online solutions like WebOffice and SalesForce, some essential issues can be resolved. The products offered by these organizations vary but they are all efficient solutions to manage customer and project details. Products offered by Salesforce are free for Non-profits and are excellent solutions for managing details like leads, opportunities, reports, budget and meetings regarding a project. Since these solutions are online the organization would not need to invest into backing up their data internally as frequently as they currently do, since the data is on a reliable database. It is essential to note that since most of the details are online, the data can be accessed by members from any location and with a good level of security as well.

Reasons behind the goal:
NorthSide Leadership has been handling a number of projects and it is essential for them to keep track of every detail of the project and its customers. Since every project deals with a number of issues such as project analysis, negotiations and construction deadlines, a timeline to manage all this data is vital. Considering the importance of the data and deadlines in their business, a reliable and systematic managing application would be very useful. Through this application access to this data is secure and all the data is confidential. The technical support is also available instantly for most of the products online.
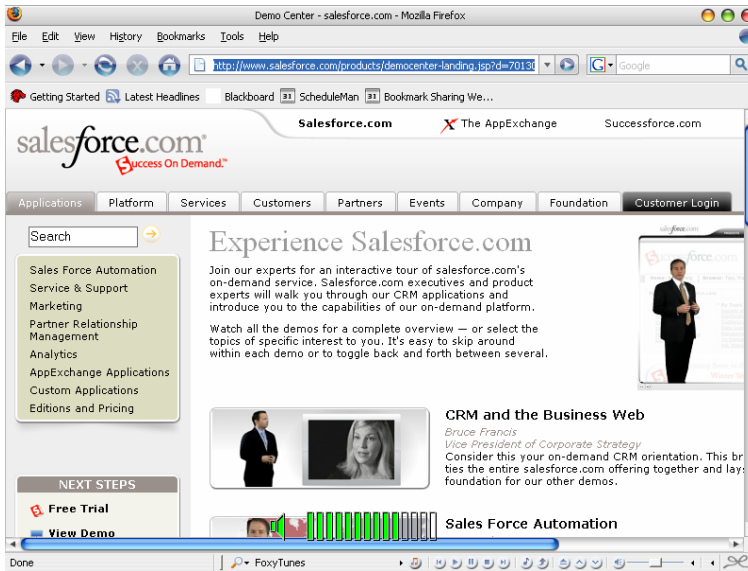
Approach:
1. Present the live demo to most of the people on the organization. For example: A demo for Salesforce can be found at

http://www.salesforce.com/products/democenter-landing.jsp?d=70130000000CowK.
A demo for WebOffice can be found at
http://www.weboffice.com/
(The demonstrations are self explanatory.)

2. Pass a questionnaire trying to evaluate the benefits of this application for the organization.
3. If it sounds appealing, ask a few people to try the free online version for a month.
4. If a positive feedback is obtained and the application looks simple to use and essential, try looking for the subscription, if it fits for you.
5. The registration form can be found online, on the pricing site.

6.
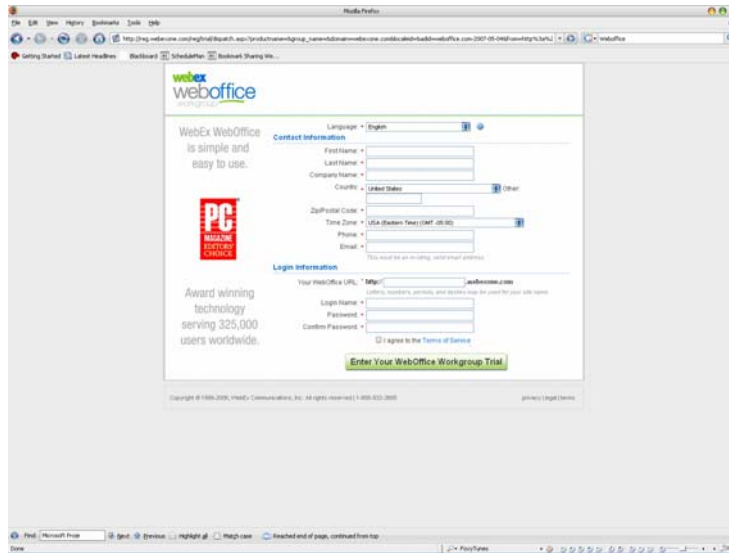
7. The pricing for a non-profit is different from the normal corporate price.

8. The following are steps stated on the site by WebOffice:

- "**If you are a non-profit/not-for-profit organization** and have proof of your not-for-profit status, you should order now or upgrade your existing trial at our usual commercial rate. You will receive an email confirming your registration which will reference our commercial rate.

- **Fax proof of your non-profit status** to 781-565-6330. Please include your name, site URL and email address, should we need to contact you concerning your request.

- **After we receive and approve** your not-for-profit documentation, we will update your site billing record with the non-profit pricing plan. If you have any questions, please call our billing department at 888-932-2600."

(http://www.weboffice.com/EN/Pricing/NonProfit/)

WebOffice provides facilities for migrating data as well. The following is from the WebOffice Website ()

"Custom Database Design and Migration

Let our Professional Services Team create custom databases using the WebOffice Database application. We'll work with you to create an effective and customized database based on your specific needs saving you time - and cost. We'll help you import your existing database information and make sure your WebOffice Database functions just the way you need it"

(http://www.weboffice.com/EN/Services/Workgroup/AddOns/)

This also includes various features such as training.

But since it also shows a high degree of integration with Microsoft files, there is a possibility to import these files easily.

Outcomes:
- Offers a reliable source for data management
- Offers an organized and structured manner for data management.
- Increases utility and convenience due to integrity with Microsoft Project and Outlook.

Internal resources:
- Community Partner – A budget to invest into an online solution.
- A reliable and high speed connection to the internet.
- Alternate sources of internet, in case the primary source of internet is down.
- Community partner – who will convey the idea and provide all the resources for training other staff members
- Questionnaire among staff members who will be the potential users of the functions

External resources:
- Existing online customer relation services –
- www.salesforce.com
- www.basecamp.com
- www.airset.com
- www.weboffice.com
- Online training sessions
- Online application solutions
- http://www.weboffice.com/EN/Services/Workgroup/AddOns/DBServices.asp - Data Migration services.

Budget:

- The cost of subscribing for the online service, if the service is not free.
- The cost of training staff members to understand the concept and usage better.
- The cost for implementing the questionnaire

About the Consultant

Student consultant in this partnership is Ankit Jhaveri, a candidate of Master of Science in Information System Management. Ankit is in his first year of the master program, and is planning to pursue a career in technology consulting.

Past Community Partners

4 Kids Early Learning Centers
Addison Behavioral Care, Inc.
Alafia Cultural Services
Alcoa Collaborative
Allegheny County Housing Authority
Allegheny General Hospital Pastoral Staff
American Association of University Women
Animal Friends, Inc.
Animal Rescue League
ASSET, Inc.
ASTEP-Grace Memorial Presbyterian Church
Auberle
Bedford Hope Center
Bedford Initiatives
Bethany House Ministry
Bethlehem Haven
Bishop Boyle Center
Bloomfield-Garfield Corporation
Borough of Crafton
Boys & Girls Club of Duquesne-West Mifflin
Boys & Girls of Wilkinsburg
Braddock Carnegie Library & Community Center
Braddock Redux
Brashear Association, Inc.
Breachmenders
BTC Center
Calliope: The Folk Music Society
Career and Workforce Development Center East
Carnegie Library of Homestead
Carnegie Library of Pittsburgh
Carnegie Science Center
Center Avenue YMCA
Center for Creative Play
Center for Hearing and Deaf Services, Inc.
Center of Life
Central Academy
Central New Development Corporation
Child Watch of Pittsburgh
Children Youth Ministry
Children's Museum
Christian Life Skills
Citizens to Abolish Domestic Apartheid
Community Day School
Community House
Community Human Services Corporation
Community Technical Assistance Center
Competitive Employment Opportunities
Conflict Resolution Center International
Consumer Action Response Team
CONTACT Pittsburgh
Creative Nonfiction Foundation
Dance Alloy
East End Cooperative Ministries
East End Neighborhood Employment Center
East End Neighborhood Forum
East Liberty Development
East Liberty Presbyterian Church
East Side Community Collaborative
Eastminster Child Care Center
Eastside Neighborhood Employment Center
Education Center

Every Child, Inc.
Fair Housing Partnership
Faison Development & Opportunities Center
FAME
Family Services of Western PA
Family Tyes
First Charities/First United Methodist Church
Friendship Development Association
Garfield Jubilee Association, Inc.
Gateway to the Arts
Girl Scouts - Trillium Council
Glen Hazel Family Reading Center
Greater Pittsburgh Community Food Bank
Greater Pittsburgh Literacy Council
Greenfield Senior Center
Guide Runners
Gwen's Girls
Hazelwood Senior Center
Hazelwood YMCA
Heritage Health Foundation
Hill House Association
Hill/Oakland Workforce Collaborative
Himalayan Institute of Pittsburgh
Hope Academy of Music and the Arts
Hosanna House
Housing Alliance of Pennsylvania
HUB Downtown Street Outreach Center
Hunger Services Network
Interfaith Volunteer Caregivers
Jane Holmes Residence
Jewish Family & Children's Service
Jewish Residential Services
Joy-Full-Gospel Fellowship After School Program
Just Harvest
KidsVoice
Kingsley Association
Lawrenceville Development Corporation
League of Young Voters
Light of Life Family Assistance Program
Madison Elementary School
Manchester Academic Charter School
McKees Rocks Terrace
McKeesport Collaborative
McKelvy Elementary School
Mental Health Association of Allegheny County
Message Carriers
Methodist Union of Social Agencies
Miller Elementary School, Principal's Office
Mon Valley Initiative
Mon Valley Providers Council
Mon Valley Resources Unlimited
Mon Valley Unemployment Committee
Mon Yough Community Services
Mount Ararat Community Activities Center
NAACP National Voter Fund
National Alliance of the Mentally Ill
National Association of Minority Contractors /
   Black Contractors Association
Negro Educational Emergency Drive
New Beginnings Learning Center
New Penley Place

Past Community Partners (continued)

Northside Coalition for Fair Housing
Northside Institutional Children Youth Ministry
Northside Leadership Conference
OASIS Senior Center
Opera Theater of Pittsburgh
Operation Better Block
Orr Compassionate Care Center
Outreach Teen & Family Services
Parental Stress Center
Pennsylvania Biodiversity Partnership
Pennsylvania Low Income Housing Coalition
Peoples Oakland
Phase 4 Learning Centers, Inc.
Pittsburgh Action Against Rape
Pittsburgh Citizens' Police Review Board
Pittsburgh Foundation
Pittsburgh Health Corps
Pittsburgh Interfaith Impact Network
Pittsburgh Mediation Center
Pittsburgh Social Venture Partners
Pittsburgh Toy Lending Library
Pittsburgh Vision Services
Pittsburgh Voyager
Pittsburgh Youth Symphony Orchestra
POISE Foundation
Program for Health Care to Underserved
   Populations
Project Educate
Providence Family Support Center
Radio Information Service
Reading Is Fundamental Pittsburgh
Regional Coalition of Community Builders
River Valley School
Rodef Shalom
Rodman Street Missionary Baptist Church
Ronald McDonald House Charities of Pittsburgh
Rosedale Block Cluster
Sacred Heart Elementary School

Rx Council of Western PA
Salvation Army Family Crisis Center
Sarah Heinz House
Schenley Heights Community Development
   Center
Second East Hills Social Services Center
Sharry Everett Scholarship Fund
Sixth Mount Zion Baptist Church
Southwest Pennsylvania Area Health
St. James School
St. Stephen Elementary School
Sustainable Pittsburgh
Thomas Merton Center
Three Rivers Center for Independent Living
Three Rivers Youth
TLC-USA
Turtle Creek Valley Council of Governments
Tzu Chi Wen Chinese School
Union Project
United Cerebral Palsy
Univ. of Pittsburgh - Division of Applied Research
   and Evaluation
Urban League of Pittsburgh
Urban Youth Action
Ursuline Services
Vintage Senior Center
Weed & Seed Program, Mayor's Office
Wesley Center
West Pittsburgh Partnership
Wireless Neighborhoods
Women's Enterprise Center
Working Order
YMCA McKeesport
YMCA Senior AIDE Center
Youth Fair Chance
YouthBuild
YWCA Bridge Housing
YWCA of McKeesport

Community Partner Information FAQ
(continued from back cover)

7. What does it cost to be a Community Partner?

The cost for participating in this experience is your time and your commitment to follow through as agreed. As leaders of community organizations, we know your time is of premium value. Those who have made this investment of time have reaped returns many times over.

8. What does the Community Partner have to offer Carnegie Mellon students?

- Students learn to structure unstructured problems. Community organizations are complex environments with complex problems. Your organization provides excellent environments in which to practice the art of structuring problems.
- Students come from different cultural backgrounds and most have never been in a nonprofit organization. They are practicing how to communicate across cultural differences and across technical knowledge differences. They need to be able to make mistakes and learn from them. Community partners provide a supportive relationship in which students can take risks and learn about how to communicate, how to relate, and how to maintain professionalism.
- Students get the opportunity to practice process consulting. They are learning that expertise is only as valuable as the ability to help others solve authentic problems. You provide a context in which students can practice these skills.
- We've found that Community Partners are very appreciative for the students' assistance. There is nothing more rewarding than to experience your efforts as valuable and rewarding for others. You provide that experience for students.
- Finally, you offer a glimpse into career opportunities in the nonprofit arena. Students learn to appreciate those who work in the nonprofit sector, and they grow to appreciate the role and function of community organizations. We hope this appreciation not only informs the choices they make in life, but also encourages them to care and give back to the community throughout their professional careers.

9. How do I become a Community Partner

Contact an instructor, Joe Mertz or Scott McElfresh. Send your contact information: name, title, name of organization, address, phone, fax, location of organization and your interest in being a Community Partner. You will have a telephone conversation and possibly an on-site visit. All organizations are considered, though preference is given to organizations providing services to a low-income community or a community at risk for falling into the "digital divide."

Send email to
instructors@tcinc.org
(email preferred)

Or call
Joe Mertz: 412.268.2540
Scott McElfresh: 412.268.4859

10. Caveats

- We do our best to ensure that students who sign-up for the class are committed to completing the class, however, occasionally, a student ends up withdrawing from the class during the semester. Typically, this happens when a student has under estimated the time they need for this class. We do our best to advise students so this does not happen. When it does happen, there is nothing we can do except to invite the Community Partner to participate in the following semester.
- The semester is short and the student has to do a lot of work in a short amount of time. For this reason, it is critical that you keep your scheduled appointments, do the work you agree to do, and maintain communication with the student. The student will need your feedback on reports quickly, often the next day. When we get to the final consulting reports, we will need fast turnaround time from Community Partners because we also need to get the reports published in time for the Community Technology Forum.
- If there is any chance that you think you will not be able to follow through with the requirements of this partnership, please wait until such time as when you are able to do it. Since the Community Partner is the focus for the student's learning, it is essential that the partnership be sustained for the semester.

Community Partner Information FAQ

1. What is the goal of the partnership in this course?

The goal of this class is to expand the capacity of the Community Partner to use, plan for, and manage technology, administratively and programmatically. The student is learning process consulting, project management, communication, relationship management, problem identification, and analysis.

2. As a Community Partner, what can I expect to happen?

Once you match with a student consultant, you will set a meeting schedule that you and the student will keep for the remainder of the semester. The student comes to your location for 3 hours a week. During this time you and the student work together. This is not an internship in which the student merely works on site. Rather, it is a consulting partnership in which you must work together to achieve your technology goals. The student facilitates a process that moves from assessment, to analysis of problems and opportunities, to defining a scope of work, to developing a work plan, to analyzing outcomes and finally presenting that analysis. As the Community Partner, you are the consulting client. You provide information and discuss that information with the student. But you are more than a client; you are also a learner. In process consulting the client "owns the problem" as well as its solution. The consultant facilitates the client in achieving that solution. The consultant doesn't "do for" the client. Rather, the consultant works with the client.

3. What types of activities are typically included in a scope of work?

Each scope of work is unique and depends solely upon the specific needs and opportunities of the individual Community Partner. Partnerships have focused on a wide range of activities, including: personal information management (how to use Windows, organize files, backup files, use various software packages, use time managers, use Palm Pilots and other personal information management tools, e-mail, etc.), developing a plan for how to train staff and how to incorporate knowledge and skill into job description, designing a local area network, implementing Internet connectivity, designing and developing a web site, determining effective data storage methods, analyzing the needs for an information database, designing and implementing a database, solving technical problems, designing a public community technology access center, determining the specifications for computers, developing disaster recovery plans, and more.

4. Who can be a Community Partner?

This course target individuals playing an administrative or programmatic leadership role within a community organization. Typically Community Partners are Executive Directors, Directors, Assistant/Associate Directors, Coordinators, and Managers. But, we make the selection based on the organization and the role that the individual plays within that organization, regardless of title.

5. Why do you focus on organizational leaders?

For an organization to use information technology effectively, its leaders must have a vision for how it can support the organization's mission, they must be comfortable enough to integrate technology into their personal work practices, and they must know enough to budget, staff, and subcontract appropriately. By partnering one-on-one with a student consultant, the leader has a unique opportunity to build that vision, comfort, and knowledge, no matter where they are starting from.

6. What are the requirements for being a Community Partner?

- Hold a leadership role within your organization.
- Have a computer in your office or one you could or do use in your job.
- Reliably meet with the student consultant 3 hours per week, every week, for about the 13 weeks.
- Come to an on-campus gathering 2 times during the semester. Once at the beginning and once at the end.
- Share information about your organization with the student consultant.
- Read project reports prepared by the student and give the student immediate feedback.
- Complete a brief response form after reading each report and return to the instructor.
- Keep a log of consulting sessions and send to instructors twice during the semester.
- Read the final consulting report. Give feedback to the student immediately.
- Make a brief presentation at the end of the semester (with the student) at the Community Technology Forum. (This is the 2nd on-campus gathering you are required to attend.)

(continued inside back cover)