

# When She Thrives

## Executive Summary

### **Community Partner**

Tiffany Huff-Strothers

### **Student Consulting Team**

Amy Luo

Sophy Peng

Divya Viswanathan

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### **Background**

When She Thrives is an organization aimed at providing support for single mothers in the Pittsburgh area who want the best for their families but may not always have the means to provide as much as they wish. The organization ideally envisions a world where all families (both single and dual income) have access to health, wealth, and success. When She Thrives has many programs and services, but one of the most significant ones is Growing Through Grants. This program aims to provide assistance and support for single mothers through financial resources. Our project will specifically be aiding the Growing Through Grants program.

### **Project Description**

#### **Project Opportunity**

The organization would benefit from centralized client information by making it easier to track client progress, involvement, and demographics. This is making their grants program difficult to manage because it's hard to track their progress, involvement, and demographics. This problem is important to solve because by optimizing their client management, they can run their projects more efficiently and ensure clients get the proper services they need. A solution would be to create a new database to integrate within their existing website for tracking client information. This would standardize the process of collecting and updating client information, improving the management and efficiency of their client programs.

#### **Project Vision**

The goal is to create a centralized, organized admin view that solves the problem of having no consistent information process as well as a way to generate visualized summaries of the data through a dashboard or report. We wanted to create an Admin view that allowed users to easily manage and organize clients. Our client Tiffany is a stakeholder as well as other administrators and future leaders. The value and benefit of this solution is that this is a centralized system for Tiffany to easily access information, organize and more efficiently manage her clients and their programs.

### **Project Outcomes**

Our team created a new client-management database using the Airtable platform. The website interface allows admins to efficiently manage and track clients of the Growing Through Grants program. Key functionalities include filtering records, generating data summary reports, and

tracking the application status of each client. There are built-in automations, such as sending weekly email reminders of clients with pending applications. Database records were migrated from existing excel files and standardized through our new record system.

By user testing, we iterated on our interface to make it more intuitive. Documentation in the form of written and video tutorials was also created to support the long-term maintenance and growth of this platform. Our solution has helped to streamline the client management process within the organization and increase overall client capacity.

### **Project Deliverables**

The deliverables included in the project are the AirTable workspace (base and interface), written documentation, and tutorial videos.

The AirTable base contains the backend database of client information, stored in a table format. Client notes make up a separate table in the base as well, which is linked to the client information table, connecting specific clients to their respective notes. The interfaces showcase five main views: the general view, client summary report view, client notes view, application status view, and grant amount view. They contain user-friendly layouts our community partner can easily navigate to accomplish the various tasks she needs to. The written documentation that we have prepared for our community partner is well-organized within a google document. It contains screenshots, detailed instructions, and links to official AirTable resources to help our community partner navigate the workspace. The tutorial videos that we made for our community partner are shared with her via a google folder. Each video relates to a task in the written documentation demoing how one would go about completing the specific task.

### **Recommendations**

A recommendation we have to maintain the new process is to keep the documentation updated. Airtable is a platform that can be updated by the company and this may change the interface. Having the screenshots and descriptions updated as this occurs will increase the efficiency of its use in the future if new members are brought onboard and need to learn AirTable from scratch. If there are repeated tasks that new users struggle with, it would be useful for someone to add it to the documentation so that they can refer to it rather than figuring it out themselves. In the future, they can expand this technology and process to their other programs such as: S.O.A.R. (Successfully Overcoming Adversity with Resilience) and Scenes from a Single Mother.

### **Student Consulting Team**

**Divya Viswanathan** served as the tech lead. She is a senior majoring in Information Systems with a minor in Computer Science. She will be working at Qualtrics in Seattle at the end of this summer and is looking toward her career in software engineering.

**Amy Luo** served as the project manager. She is a senior majoring in Information Systems with a minor in Human-Computer Interaction. She will be joining IBM this summer as a client engineering designer.

**Sophy Peng** served as the quality assurance manager. She is a senior majoring in Information Systems doing an accelerated Masters of Information Systems degree at Heinz College. She will be joining Amazon in Seattle this summer as a Software Development Engineer.