Hello Neighbor

Executive Summary

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Background

Hello Neighbor is a non-profit organization based in Pittsburgh, PA, established in 2017. It functions under the Office of Refugee Resettlement and is partnered with the U.S. Committee for Refugees and Immigrants (USCRI). The mission of Hello Neighbor is to improve the lives of recently resettled refugee and immigrant families by pairing them with dedicated local neighbors who guide and support them as they adjust to life in the U.S.

Project Description

Project Opportunity

Hello Neighbor is primarily funded by grants and their grant management system is composed of storing grant information across Notion, Little Green Light, and Google Drive. Opportunities were identified to improve the efficiency of their grant management system by tackling the challenges regarding task reminders. Deadlines are sometimes missed if members don't remember them and can lead to funder attrition. The lack of system integration also leads to duplication of manual efforts, making it more likely to forget something. Hello Neighbor is also preparing to transition into Salesforce and this is an opportunity to document recommendations for the transition.

Project Vision

The project vision was to create a centralized system that can keep track of all grant information, including where they are in the pipeline and what deadlines need to be met. Changes made to the process and technologies involved would lead to a more streamlined grant management process and documentation provided will assist them in the future transition into Salesforce.

Project Outcomes

Staff members learned how to synchronize information from Notion to Google Calendar to automate task reminders using 2Sync. A new shared Development Team Google Calendar was also established, improving the team's ability to keep track of upcoming tasks and collaborate with members outside of the development team. The grant management process was

streamlined by using Notion to automatically generate sub-tasks, reducing manual input and the risk of forgetting tasks. Comprehensive guides and scripts were also developed for a future transition to Salesforce, ensuring data integrity and simplifying the data migration process.

Project Deliverables

Documentation for changes made in Notion, 2Sync set up and debugging, and Salesforce transition instructions were delivered. Python scripts to extract data from Notion exports and excel templates are included to help with the data importing from Notion into Salesforce. A fictional grant scenario is provided to provide context to examples used in our documentation. Supplementary materials such as video tutorials and walkthroughs are also included.

Recommendations

One recommendation is that the documentation should be available to all team members as well as using the documentation during onboarding so that new team members are familiar with the implemented tools. Another recommendation is to set up a team account for services used for the whole development team. Once the team accounts are established, services that are currently bound to personal accounts should be transitioned to the team account. For future teams working with Hello Neighbor to carry this project forward, we recommend looking into different Salesforce customizations that can be made to better suit the needs of the development team. Additionally, a suggestion is to analyze different integration tools between Salesforce and Google Calendar to maintain a centralized place for all deadlines to exist.

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Student Consulting Team

Cindy Chen served as one of the technical / programming members of the team. She will be graduating in May of 2024 with a major in Information Systems and minors in Computer Science, Business Administration, and Information Security Privacy and Policy. She will be working as a Data Engineer at Visa starting in June 2024.

Josh Huang served as a technical consultant. He will be graduating in May of 2024 with a major in Information Systems and minors in Mechanical Engineering and Game Design. He looks forward to working in the gaming industry.

Jiatong Li served as the project manager. She is a junior majoring in Information Systems with an additional major in HCI and minor in Design for Learning. She will be a knowledge management intern this summer at Genentech. She is looking toward a career related to Information Management in Healthcare/Education related fields.