**Business Insights with Uplift NW: A Deep Dive into Data**

**NEU EXPO 2024 Team WeLift’s Project Proposal**

**Team WeLift 2024.07.11**

Table of Contents

[Part I. Project Overview 2](#_Toc171615471)

[1.1 Introduction 2](#_Toc171615472)

[1.2 Summary 2](#_Toc171615473)

[Part II. Business Case 3](#_Toc171615474)

[2.1 Business Need Addressed 3](#_Toc171615475)

[2.2 Relationship to Organizational Goals: 3](#_Toc171615476)

[2.3 Benefits to the Organization: 3](#_Toc171615477)

[Part III. Project Proposal and Plan 4](#_Toc171615478)

[3.1 Mission Statement 4](#_Toc171615479)

[3.2 Project Scope 4](#_Toc171615480)

[3.3 Timeline & Milestones 4](#_Toc171615481)

[3.4 Resources 5](#_Toc171615482)

[3.5 Project Constraints 5](#_Toc171615483)

[3.6 Assumptions of the project 6](#_Toc171615484)

[3.7 Quality Requirements 6](#_Toc171615485)

[3.8 Proposed Deliverables 6](#_Toc171615486)

[Annex I Project Operation Agreement 7](#_Toc171615487)

[Annex II Data and Information Used 10](#_Toc171615488)

# Part I. Project Overview

## Introduction

The Team WeLift’s Project, *Business Insights with Uplift NW: A Deep Dive into Data*, aims to leverage existing data sets to inform strategic decisions for Uplift Northwest's future business operations. The project objectives include analyzing demographic/ geographic data and program outcomes and culminating in a presentation or report supported by visualization dashboards to tell the Uplift NW story through data.

## Summary

|  |  |
| --- | --- |
| Client/Sponsor: | Uplift NW, Saudia Abdullah, Chief Mission Officer |
| Project Schedule: | June 27 - August 22 |
| Client’s Needs: | Make data-driven decisions regarding the demographics of the participants they serve, their locations, and the effectiveness of the program. |
| Final Product Expected: | 1. A presentation or report using data along with visualization dashboards. 2. Tell the Uplift NW story through data. |
| Data Source: | From client’s salesforce database, official website and impact report |
| Proposed Project Problems & Deliverables | 1. Data visualized dashboards to answer: 2. Who are the participants? 3. Where are they live? 4. Recommendation and storytelling report with sample solutions. May involve the following questions: 5. What do the participants need? 6. What do the participants already have? 7. What more data should be collected? 8. How should the data be used? 9. What gaps and challenges are noticed? 10. Final Presentation |

# Part II. Business Case

## Business Need Addressed

The project addresses Uplift Northwest’s need to make data-driven decisions regarding the demographics of the individuals they serve, where they live, and the effectiveness of the client’s programs. This information is crucial for successfully launching and operating their new facility.

## Relationship to Organizational Goals:

The project aligns with Uplift Northwest’s mission to provide dignified jobs and job-readiness services to individuals experiencing poverty. By utilizing data to guide strategic decisions, the organization can better serve its participants and enhance its program offerings.

## Benefits to the Organization:

1. Enhanced understanding of participant demographics and needs.
2. Data-driven insights to improve program outcomes.
3. Strategic allocation of resources and revenue.
4. Visual storytelling through data to support stakeholder engagement and decision-making.

# Part III. Project Proposal and Plan

## Mission Statement

To utilize existing data sets to provide actionable business insights for Uplift Northwest, guiding strategic decisions and improving program outcomes through data analysis and visualization.

## Project Scope

1. Analyze given Salesforce data and the Impact Report.[[1]](#footnote-1)
2. Address key questions[[2]](#footnote-2) regarding demographics and program outcomes.
   * Focusing on the participants as groups, not as individual case
   * Finding out where these participants come from (if with Geo data)
   * Finding out who these participants are by telling:
     + The age: maximum, minimum, median, and yearly changes
     + The housing status: each category percentage
     + Hiring analysis: how many returns and when, how many active, how many give up
     + Others may include education, previous employment, household size, number of dependents, veteran status, enrollment in school, and language.
3. Identify data gaps and draw informed assumptions.
4. Develop visualization dashboards to present findings.

## Timeline & Milestones

|  |  |  |
| --- | --- | --- |
| Week | Goal | Deliverable |
| Week 1  Jul 1 – Jul 7  Setting up | 1. Understanding the Project 2. Request for data 3. Know the team | 1. Teams’ setup 2. Meeting with the Client |
| Week 2  Jul 8 – Jul 14  Data Collection | 1. Collect the data 2. Scope the project 3. Get conformation from the client 4. Understand the data 5. Assign data analysis topics and tasks | 1. Project Proposal 2. Data Brief report 3. Operation Agreement 4. Milestone & Plan Sheet |
| Week 3  Jul 15 – Jul 21  Data Analysis  (Individual Task) | 1. Analyze Data 2. Relate to scope and client’s need 3. Keep asking questions from data 4. Assign tasks for next week | 1. Analysis report with each data topics 2. Findings from raw data (what) 3. Story-telling logic (how) 4. Connections with other topics (why and how) 5. Connections with client’s need (why and how) 6. Identify the gaps and challenges and Recommendations or solutions (what, why and how) 7. Plans for next week 8. Which topics are related 9. Gaps or challenges, and What kind of solution 10. What visualizations? |
| Week 4  Jul 22 – Jul 28  Gathering Findings  (Group Task) | 1. Connect each other’s findings and create story-telling flow 2. Gathering all the gaps and challenges noticed, and the recommendations and solutions 3. Analyze any new data 4. Assign tasks for next week | 1. Data analysis report 2. Dashboards lists and assignments 3. Other visualization assignments |
| Week 5  Jul 29 – Aug 4  Dashboard Development  (Individual & Group Task) | 1. Dashboards creations and check 2. Visualization creations 3. Solution or recommendation samples creations 4. Assign tasks for next week | 1. Dashboards 2. All other visualizations 3. Solution or recommendation document |
| Week 6  Aug 5 – Aug 11  Presentation Preparation  (Group Task) | 1. Slides, or web for presentation 2. PDF report creations 3. Practice presentation together | 1. Slides or web 2. PDF report |
| Week 7  Aug 12 – Aug 18  Presentation  (Date TBD) | 1. Practice presentation together 2. Presentation to clients and stakeholders | 1. presentation |
| Week 8  Aug 19 – Aug 22  Showcase | 1. final showcase | 1. final showcase |

## Resources

1. Data from Salesforce, the UpLift website, and the Impact Report.
2. Project team members with expertise in data analysis and visualization.
3. Support and guidance from Uplift Northwest, Professor, and coach.

## Project Constraints

1. Limited time frame for data analysis and dashboard development.
2. Dependence on the accuracy and completeness of available data.
3. Potential technical challenges with data integration and visualization tools.

## Assumptions of the project

1. **Data Accessibility:** All necessary data will be accessible and accurate.
2. **Team Collaboration:** Team members will actively collaborate and adhere to deadlines.
3. **Stakeholder Support:** Stakeholders will provide timely feedback and support.
4. **Resource Availability:** Required resources, including data analysis tools and software, will be available and operational.

## Quality Requirements

1. Comprehensive and accurate data analysis.
2. User-friendly and informative visualization dashboards.
3. Clear and actionable insights in the final presentation and report.
4. Timely completion of all project milestones.

## Proposed Deliverables

1. **Data Analysis Report**: A detailed report summarizing the findings from the Salesforce data and Impact Report, addressing key questions about demographics, program outcomes, and revenue allocation.
2. **Visualization Dashboards**: dashboards to visually represent key data insights, including charts, graphs, and maps.
3. **Final Presentation**: A comprehensive presentation summarizing the project findings, strategic recommendations, and visualizations.

# Annex I Project Operation Agreement

**WeLift Team Operating Agreement**

**July 11, 2024**

|  |  |
| --- | --- |
| **Client**: | UpLift NW |
| **Contact**: | Saudia Abdullah |
| **Coach and Advisor:** | Emily Stimac,  Jiying Guo,  Samad Aidane |
| **Team Members:** | ChengYang Shen,  Dia Khosla,  Himanshi Solanki,  Yiwen Wang,  Zhihang Cheng |

**Introduction**

This **WeLift Team Contract** (“**Contract**”) is made and entered into by and among the **WeLift team members** (“**Team Members**”) to establish the terms, commitments, and responsibilities for the successful completion of the project. The purpose of this Contract is to ensure a collaborative, respectful, and efficient working environment, delineate roles, and set forth guidelines for communication, conflict resolution, and accountability.

**Article I: Meeting Attendance**

1.1. Team Members shall attend all scheduled meetings.

1.2. If a Team Member is unable to attend a meeting, they shall notify other Team Members in advance and review meeting notes promptly.

**Article II: Respectful Communication**

2.1. Team Members shall respect each other's views and ensure everyone has an opportunity to share their ideas and opinions.

**Article III: Conflict Resolution**

3.1. Team Members shall listen to and respect each other's opinions and collaboratively find solutions.

3.2. For unresolved conflicts, guidance shall be sought from the project manager, professor, and coach.

3.3. Conflicts shall be kept professional and not taken personally.

**Article IV: Team Support**

4.1. Team Members shall support, empower, and help each other to work efficiently.

4.2. Responsibilities, failures (if any), and successes shall be shared as a team.

**Article V: Accountability**

5.1. If a Team Member misses deadlines or fails to complete tasks, the issue shall be addressed, and the team shall work together to rectify the situation.

**Article VI: Data Analysis and Decision Making**

6.1. Team Members shall brainstorm ideas and make strategic decisions collaboratively.

6.2. Key findings shall be shared with the team and project manager promptly.

**Article VII: Roles and Responsibilities**

7.1. **Himanshi** (Project Manager): Document and oversee project progress and act as a communicator between the team and stakeholders.

7.2. **Chengyang** (Technical Solutions, Data Analysis): Perform technical and data analysis tasks.

7.3. **Zhihang** (Technical Solutions and Presentation): Provide technical solutions and strategic suggestions and contribute to the final presentation.

7.4. **Yiwen** (Technical Solutions and Presentation): Perform technical tasks, organizing, public speaking, and relationship building.

7.5. **Dia** (Data Analysis): Clean data, assist with data modeling and visualization, provide key findings, and contribute to innovative solutions.

**Ground Rules**

**1. Communication, Communication, Communication**

1.1. Team Members shall complete their individual work by **Saturday 12 pm PST**.

1.2. The team shall collaborate on documents via Teams Channel.

1.3. Team Members shall discuss deliverables in the Teams Group.

1.4. Team Members shall attend weekly scheduled meetings, including Client weekly meetings on Mondays at noon.

1.5. Collaborative work shall be completed by **Sunday 12 pm PST**.

1.6. If a Team Member needs help, thinks a section of the project needs more work or is stuck, they shall reach out to Teams.

1.7. If a Team Member is sick or otherwise unable to work, they shall notify the Project Manager to help with their part of the assignment.

**2. Conflict Resolution**

2.1. Conflicts shall be discussed and resolved according to the first communication rule.

2.2. If the conflict involves the assignment, Team Members shall take a breath and discuss the issue calmly.

**Conclusion**

This Contract ensures our commitment to collaboration, respect, accountability, and effective communication within the WeLift team. By adhering to these terms, Team Members aim to achieve a successful and harmonious project completion.

By initialing below, I agree to the above operating procedures for Team Five.

|  |  |
| --- | --- |
| **Name** | **Initials** |
| ChengYang Shen | CS |
| Dia Khosla | DK |
| Himanshi Solanki | HS |
| Yiwen Wang | YW |
| Zhihang Cheng | ZC |

**Contact List:**

|  |  |  |
| --- | --- | --- |
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# Annex II Data and Information Used

This list will be expanded during the project.

1. **Data from Salesforce:**
2. BEFT Active Participants
3. Age-2024-07-08-10-36-35
4. Employment & Mission Programs Teams.png
5. Hirings 2024
6. Hirings 2018-2024
7. LEO SDOT Demographic
8. Orientation
9. Job Placement
10. **Data from UpLift:**
11. **Impact Report 2023**: <https://2023impactreport.upliftnw.org/>
12. **Official site:** <https://upliftnw.org/>
13. **Information from meetings, emails or visits:**

**Email Answers from July 10:**

1. **Interview questions on Mondays:**
   * What are your short and long term goals?
   * What are the most important traits of being a team player, and how have you demonstrated them in the past?
   * What is an example of a conflict you’ve had with a coworker? How did you handle it?
   * What does professionalism mean to you?
   * If you’re having a bad day, how do you ensure you still perform well at work?
   * Think about a recent job that you had. How do you feel you could have done the job better?
2. **Detailed Program & partnerships information:**
   1. **LEO/ SDOT :**

A randomize project that gives participants access to ORCA cards for free transit for 1 year.

* 1. **Diversion:**

A pretrial program with the city of Seattle that aims to keep people from having a criminal conviction if they are able to find employment.

* 1. **BFET:** Basic Foodstamp Employment Training:

Designed to offer assistance to people on SNAP (federal foodstamp program) get training and find employment

* 1. **Career Pathways:**

An internship program for people on BFET

1. **How would the potential participants know uplift program?**

Word of mouth and website

1. **How do they get payment?**

Everyone is paid via the payroll system, and pay checks

1. **Are you checking the IDs? if no IDs, what do you do?**

Yes, we ask for 2 forms of ID

**Meeting answers from July 11:**

1. For the question in LEO, “Are you employed full-time or part-time?”: It is asking about employment outside the uplift.
2. When the client asks about where they live, they ask for GEO information and pull out a GEO-related table for us.
3. The client want us to analyze the training so that they can prepare a training hour report for us.
4. There is no need to further analyze things in BFET and LEO; use them when necessary.
5. About “Hiring” clarification: when the client talks about hiring, it means that these people join the program, qualifying them as hired by the organization.
6. There is no need to consider income because they pay an average salary.
7. **Other Sources**
8. **City of Seattle, U-SEAT:** <https://www.seattle.gov/transportation/projects-and-programs/programs/transportation-access-programs/uplift-seattles-equitable-access-to-transit-(u-seat)>

1. See the detailed list of data in Annex II. [↑](#footnote-ref-1)
2. Key questions: who the participants are, where these participants are, and the findings from them. [↑](#footnote-ref-2)