SBABS

**Lessons Learned Report**

#### 

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## Problem Statement

Spring Branch Animal and Bird Sanctuary (SBABS) relies on a paper filing system. Without an electronic database, simple daily tasks become arduous and tracking rescues and adoptions in real time is impossible. Accounting problems also arise as the organization cannot track the cost of caring for an animal and reconciling these costs with adoption fees and donations collected. Additionally, because of this mode of operations, the organization lacks the time needed to advertise itself or hire and train new volunteers.

These issues warrant immediate attention, if things continue on as they were, the organization will have accumulated a greater workload than can be reasonably maintained. In an attempt to remedy these issues, our team will be providing SBABS with a user friendly electronic database that is compatible with window operating systems. The accounting details will be integrated into the database to be developed. For this project, we will customize the database to suit needs specified by the client and assist with the onboarding of volunteers.

## Project Mission Statement

The team’s mission is to implement a user-friendly database that enables SBABS transition from the current paper filing to an online software. We will also assist in developing custom email drafts that will be used to attract future volunteers. To accomplish this we will…

1. Provide the client with ready software that will be utilized freely with little to no maintenance. The workflow must adhere to all customer requirements to ensure proper documentation of the animal shelter.
2. Generate draft emails the owner will be able to utilize to attract potential volunteers from varying schools or universities. The volunteer forms will attract future volunteers for animal shelter experience and data entry experience.

## Project Goals

Our goals for this project are as follows…

* Decrease the record keeping time-management by at least 20% by transitioning paper documentation to a database software by December 2022.
* Attract 2 volunteers by September 2022 using custom email drafts sent to varying schools for volunteer experience in an animal shelter location.

Our first goal was to decrease the record keeping time-management by at least 20% by transitioning paper documentation to a database software by December 2022. Before the commencement of this project the method of keeping records was through paper filing. Whenever there is a new customer, a new file would be opened and the records concerning the individual and their animals would be hand written in the file. The same method applied when updating the paperwork.

As you might imagine, this took a lot of time to do. By implementing the Shelterluv database, our client will no longer have to write things out by hand. For example, he will no longer need to type the full address of the customer or write out everything about the animal. Installing Shelterluv allowed our client to just click buttons to enter in everything about a particular animal (e.g. name, sex, year etc.).

The client will no longer have to constantly keep track of various documents due to the surrender intakes and adoption outtakes. Paper will now become completely obsolete and the owner is able to focus on other issues within the shelter. I believe by the end of December 2022 the record time-management will completely satisfy our requirements by decreasing record keeping time-management by 20%. The owner does not have to file and organize the documents for the prior year, everything will already be implemented in the system. Shelterluv allows reports to be generated for any given year for the client.

With regards to our second goal, we customized two separate email drafts that were integrated into the shelterluv software for future reference. This will allow the owner’s to send these out to various schools in order to attract more long term volunteers from high schools who are looking for experience to get into college. This will also provide the volunteers experience in caring for animals or data entry for their future career aspirations.

## Project Work Requirements

###### Implementation of Shelterluv software

###### Establish a training manual

###### Data entry

###### Volunteer draft documents

## Project Overview

**Choosing a software**

The team researched multiple databases initially. We gathered all the necessary information with the pros and cons of each of the softwares. This information consisted of the price of the software, different features, ease of use, and availability of offline or online.

**Project Work Requirement #1 - Implementation of Shelterluv software**

Upon agreement with the owner of Spring Branch and Animals birds Sanctuary Shelterluv database was installed on their system. Again the project manager reviewed the database with the owner of SBABS and thereafter payment was made for a paid version of Shelterluv. A shelterluv agent has been in constant contact with the project manager as well as the client to assist in the onboarding process.

**Project Work Requirement #2 - Establish a training manual**

Based on the level of computer literacy of the owner SBABS and for easy accessibility of the Shelterluv database a self training manual was provided. The training manual was simple with pictures to aid understanding for the most essential features when using Shelterluv. This manual is also very intuitive so that any future volunteers will be able to reference the training manual and get a general grasp of the software.

**Project Work Requirement #3 - Data entry**

For the Data entry portion, we assisted with helping the client get at least 1 year of past data for any adoptions and surrenders. This will ensure past documentation is already present within the software so the owner will be able to refer back to them at any time. The animals from these previous records are also the most recent animals present within the shelter and will allow any future adoptions to be easier to access.

**Project Work Requirement #4 - Volunteer draft documents**

We drafted 2 separate volunteer documents customized by one of our group members. These emails are highly customizable for the client to where they are able to fill in the information based on who they are trying to reach out to. These are able to be sent out to any schools or any other organizations as they are very professional and are meant to seek out passionate volunteers.

## Working schedule

*Table 1: Working Schedule*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Action Number** | **Action** | **Task Duration**  **(days.hour)** | **Start** | **End** |
| **A.** | Installation of Shelterluv Software | 0.2 | 11/13/2021 | 11/13/2021 |
| A.1 | Check system requirements on clients computer | 0.2 | 11/13/2021 | 11/13/2021 |
| A.2 | Valid space on clients computer for shelterluv software | 0.2 | 11/13/2021 | 11/13/2021 |
| A.3 | Install shelterluv software | 0.2 | 11/13/2021 | 11/13/2021 |
| **Action Number** | **Action** | **Task Duration**  **(days.hour)** | **Start** | **End** |
| A.4 | Assist with backing up data in a external hard drive | 0.2 | 11/13/2021 | 11/13/2021 |
| A.5 | Provide brief overview of how to open and save Shelterluv to the client | 0.2 | 11/13/2021 | 11/13/2021 |
| **B.** | Establish training manual | 7.0 | 11/20/2021 | 11/27/2021 |
| B.1 | Develop a training manual | 4.0 | 11/20/2021 | 11/24/2021 |
| B.2 | Review the training manual | 1.0 | 11/24/2021 | 11/25/2021 |
| B.3 | Train the client utilizing the training manual | 0.4 | 11/24/2021 | 11/26/2021 |
| B.4 | Allow the client to get familiar with the software entering necessary data | 0.4 | 11/24/2021 | 11/26/2021 |
| B.5 | Document necessary improvements for the training manual | 2.0 | 11/24/2021 | 11/26/2021 |
| B.6 | Create finalized training manual in an online format / paper format for future client use | 1.0 | 11/26/2021 | 11/27/2021 |
| **C.** | Data Entry | 8.0 | 11/27/2021 | 12/5/2021 |
| C.1 | Gather the files of current animals present at the shelter | 1.0 | 11/27/2021 | 11/28/2021 |
| C.2 | Create preset animal data (dogs, cats, birds) | 1.0 | 11/27/2021 | 11/28/2021 |
| C.3 | Build preset documents of current paper forms online (Adoption, release, donations) | 1.0 | 11/27/2021 | 11/28/2021 |
| C.4 | Enter data of current animals present at shelter in the software | 8.0 | 11/27/2021 | 12/5/2021 |
| C.5 | Validate data entry with client, update files if necessary | 1.0 | 12/4/2021 | 12/5/2021 |
| **D.** | Volunteer draft documents | 8.0 | 11/20/2021 | 11/28/2021 |
| **Action Number** | **Action** | **Task Duration**  **(days.hour)** | **Start** | **End** |
| D.1 | Create custom draft emails | 4.0 | 11/20/2021 | 11/24/2021 |
| D.2 | Review draft email with clients to suit business needs | 1.0 | 11/24/2021 | 11/25/2021 |
| D.3 | Create online fillable forms for potential volunteers | 8.0 | 11/20/2021 | 11/28/2021 |
| D.4 | Verify online forms will notify owner upon completion | 1.0 | 11/27/2021 | 11/28/2021 |
| D.5 | Review and update online forms | 1.0 | 11/27/2021 | 11/28/2021 |
| **E.** | Finalization / Feedback | 9.0 | 12/5/2021 | 12/14/2021 |
| E.1 | Receive feedback from client | 9.0 | 12/5/2021 | 12/14/2021 |
| E.2 | Final updates on the software | 9.0 | 12/5/2021 | 12/14/2021 |

## Major Changes to Working Schedule

**Validation on the Software**

Client was having second thoughts on the software when the project plan was nearing completion. We had to do further research for the client to confirm which software would ultimately be used. This change in our working schedule delayed our implementation for the required software by 3 days. We were able to work around this delay because of a future data entry delay which allowed us to focus on our training manual and volunteer documents first.

**Data Entry delays**

The client had to organize the files for the previous year, these documents were scattered and out of order. The client provided the documents after being very unresponsive 1 week later. This change had its pros and cons, for the cons first, we were unable to completely fill out the adoption files that were provided to us. Although this was a very major change to our working schedule, it allowed us to focus on other aspects of our project plan which allowed us to still keep on track with our project plan for the most part.

**Feedback delays**

With constant changes to our working schedule, mostly due to the data entry delays, we were still inputting data until the last moment. This made it to where we were unable to receive any major feedback up to the end of our project. The project manager is still set to keep in contact with the owner until the end of December to assist with any issues that the owner may come across and possibly receive feedback then. Although receiving feedback is always imperative for any project, the timing of the feedback for our project has made it to where we are unable to capitalize on any changes that we could have made possible.

## Control System

###### Quality assurance

Quality assurance is key to this project. We agreed in our project plan that the team must obtain agreement from the client for nearly every major milestone. If the client is unsatisfied with one of the deliverables, the team will rework it until it meets the clients needs. We agreed that all team members will be assigned partners as a back up plan to ensure work is being completed in a timely manner. For each milestone, we agreed that the team will review the schedule with the client to ensure all their needs are being met. The main contact at SBABS we worked with was Gary Foster, the owner.

###### Conflict resolution

Conflict resolution is the responsibility of all team members. We agreed in our project plan that if a team member disagrees with one of the deliverables, a meeting will be requested with the team to review and modify the current plan if necessary. If no agreement has been reached by this time, we will vote. If the vote results in a draw then the "chain of command" will come into play and the project manager will make the ultimate decision. If the problem continues to ensue even after the project manager has made a decision, the decision will be brought to the teacher for further clarification.

###### Change control

To account for unexpected or revisory changes to the schedule or overall project, we agreed on our project plan that weekly check-ins are required by all team members at least thrice weekly on GroupMe. Two of the check-ins will be according to the teams schedule, on Thursday and Sunday, the remaining will be a one on one session if needed with the project manager. These check-ins are a formality that assures that all team members remain aware of changes to the project and schedule and have time to alter their own plans and schedules accordingly.

Asana will be used for any updates on a specific deliverable that is assigned to a team member. If the change warrants a change in any of the milestones, the project manager will notify the team and review the assigned schedule to delegate necessary changes to the workflow. The last date for any potential updates was on December 5th, 2021.

**Analysis of Control System**

The control system worked as intended for the most part. The only problem that occurred as a result of it was that the emphasis we placed on getting the clients approval meant that our progress would be delayed at times because what we had done had not been approved. For example, it took a long time to pick out a software to use because each time we believed we had found a good software, we would have to seek out the client’s approval.

This problem could not be prevented because we did not want to risk decreasing the quality of our work or our clients satisfaction. However, we did manage to mitigate the issue by learning to prepare multiple options for the client to review. Doing so increased the chances that our client would like something and made it so that we could get approved faster. This approach worked well and we were generally able to proceed to each step of the working schedule on time.

## Risks

**Risks Analysis**

In our project plan we predicted that we might encounter problems such as loss of data, technology constraints, scope creep, and teammates being unable to assist with the work. We predicted this because we are working with technology and loss of data, the occurrence of errors, and technology constraints impeding progress are all problems that have occurred before we started working online. Additionally, our own schedules may be affected due to things like weather, work hours, and sickness.

In our project plan, we made plans should any of these situations occur. These plans are detailed in the actions section of the chart below. While we were fortunate enough to avoid almost all of these potential risks from occurring, we did experience situations where team members were unable to assist with the project. For example, two of our members had fallen sick throughout the semester and were unable to help due to this. Additionally, our schedules clashed with one another several times throughout this project. We were able to get through this by following the plan we had made ahead of time. This method worked well for us.

There were problems that we did not account for such as the loss of a group member, the clients conflicting demand, and the need for client approval slowing down the progress speed. Our client demanded both an easy to use software for beginners and a software that could store a lot of different information. However, it was difficult to find such a software given that the more information that needs to be stored, the more complex the software design becomes.

We mitigated one issue by preparing more than one option for the client to review at a time. By doing this, we increased the likelihood that we would get approval for one of them and thus increased the speed of our progression. This allowed us to finish each milestone in time. We were delayed by the loss of a group member but solved the issue by having the project manager and two other members visit the store in person and reach out to the client. Finally, we solved the third unexpected problem by creating a training manual that would instruct our client on how to use their chosen software.

*Table 2: Explanation of Risks*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Risk** | **Probability** | **Impact** | **Trigger** | **Actions** | **Occurred** | **Results of Planning** |
| Team member is unable to assist with the project | Medium | High | No response from a team member for 3 consecutive days or more | We assigned tasks within Asana and made them visible to all group members. If a team member is unable to do the work, others can divide it among each other to make sure that it gets done. | Yes | Successfully Solved Problem |
| Loss of data | Low | Medium | Sudden loss of wifi    Slow computer speed    Computer breakdown | Team members will assist the client with utilizing a hard drive as a back up and keep all up to date files saved. | No | Successfully Prevented Problem |
| Technology constraints | Low | Medium | Out of date computer  internet bandwidth is not sufficient | The team will ensure the client’s computer meets all system requirements on Asana’s support page before starting. | No | Successfully Prevented Problem |
| Scope creep | Low | Medium | Database software providing errors on a constant basis to the client | A backup database will be ready. Shelterluv has an integrated transfer we are able to use to import / export the existing files into the new software. Multiple email drafts will be provided to the client to ensure diversity in email drafts. | No | Successfully Prevented Problem |

## Overall Assessment of the Project

We were able to meet all of our goals and objectives for this project to the satisfaction of both ourselves and our client. However, there were some situations where we could have done better. In the beginning of the project, our team struggled with work division. Initially only one member was in contact with our client, everyone else was excluded. This made it to where even the Project manager had trouble with assigning the group members their tasks.

Unfortunately, this resulted in some parts of the assignments being done incorrectly and a greater amount of errors. After we decided on set roles and all of our members learned how to share the work, the frequency and severity of these errors decreased. We could have prevented this issue by discussing each other's strengths and weaknesses more at the beginning of the project and/or researching what needed to be done ahead of time in order to assign the roles earlier.

Additionally, we could have ensured that contact with the owner of Spring Branch and Animals Birds was not left to a single team member. After Vanessa left the group, we were completely cut off from our client as she was our only connection with the client. This greatly affected both the speed and efficiency of our progress because our project relies heavily on client approval and the needs of the client to get things done.

This problem could have been avoided had we allowed multiple members to get in contact with the client from the start rather than relying on one person’s information to direct the entire project. We could have also used GroupMe sooner. GroupMe allowed us to stay in contact with each other constantly and worked just like a group text. Whatever one person wrote, everyone else could see and respond to the message. It was not until after this communication failure, we slowed our progress significantly and GroupMe became the staple of communication for our group.

During this project, we learned that while making plans is important, we also need to back up those plans with additional plans to avoid having our progress slowed down after each rejection. We were searching for software for the first half of a month. Had we made backup plans for having second thoughts about the software we chose we would not have had to waste so much time waiting for the client to confirm.

Additionally, we learned through experience in the beginning of the project that relying on one person only to relay the client’s needs to everyone else in a 30 min zoom meeting every week is not an effective strategy. This experience taught us that near constant communication is necessary during a project to ensure that everyone knows what is going on, what they should be doing, and what will happen next. Communication quickly became one of our group’s greatest strengths after this failure.

We learned how to use each other's strengths to the benefit of the group. For example, by having Mary, who is uncomfortable with public speaking but good at visual designing, do more work on the PowerPoints instead of presenting verbally, we were able to save time and improve the quality of our presentation. Likewise, by having members of the group who are familiar with databases work on entering the data into them, we were able to prevent common “newbie” errors from inhibiting our progress and the quality of the database.

Finally, we learned about different softwares, the limitations to them, and how they can be used effectively both by ourselves and for our client. We learned how to use apps such as GroupMe, Google Drive and Asana to speed up our progress and assign tasks to each other. We also learned that setting due dates ahead of time for each thing that needs to be completed is necessary to prevent progress from being slowed down.