



One Degree Analytics

Business Analytics

Bipolar Disorder Society of BC (BDSBC)

True or False?

Bipolar disorder is a single mood disease.

Bipolar episodes come and goes.

90% of patients make a full recovery or significant reduction in symptoms.

Children as young as 6 years old can get bipolar disorder.

Stigma is a barrier to treatment.



Founded January 2010

Rapid approval as a Charity
Participates in research in B.C.

Strong funders & volunteer support

Operates on a tight budget of ~\$110,000

Fast growing! budget ~\$160,000 next year

Reached >1800 youth last year in schools

Runs programs for teens, women & others

Why it Matters - A Testimonial

“Because of your presentation, I feel less nervous about meeting my biological father who has bipolar disorder.”

~ Grade 11 Student, Edward Milne Community School



The Team



Cameron Day

Technical Lead



Amal Khan

Project Manager



Catherine Lord

Senior Business Analyst



Huyen Kien

Jr. Business Analyst



Vivi Pham

Communications Lead



Kevin Liu

Health Systems Analyst



Ben Nguyen

Web Developer

The Client

Bipolar Disorder Society of British Columbia (BDSBC)

The problem

The Microsoft Excel spreadsheet used to date has evolved with many columns and fields, becoming unreadable.

The data entry method produces high error rates and is difficult to report on the success of the program.

BDSBC hosts and needs to organize and track programs and events. They need to maintain data for several entities, perform searches and generate reports.



The Process

1st Client Interview

Project Charter & SRS

2nd Client Interview

Revision and Final Doc

Learned:

- The difference between Programs and Events
- The roles of Members and Volunteers
- Budget, skill and current system limitations
- The need for reporting and scheduling

Designed:

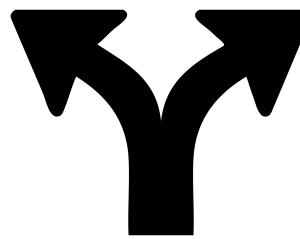
- Easy-of-use
- Secure data vault
- Search & query friendly
- Facilitates organizational scheduling
- Flexible, extensible reporting

Proposed:

- Two possible solutions
- One cloud-based (Eventbrite)
- One Excel and Access based
- Presented use cases in each technology scenario

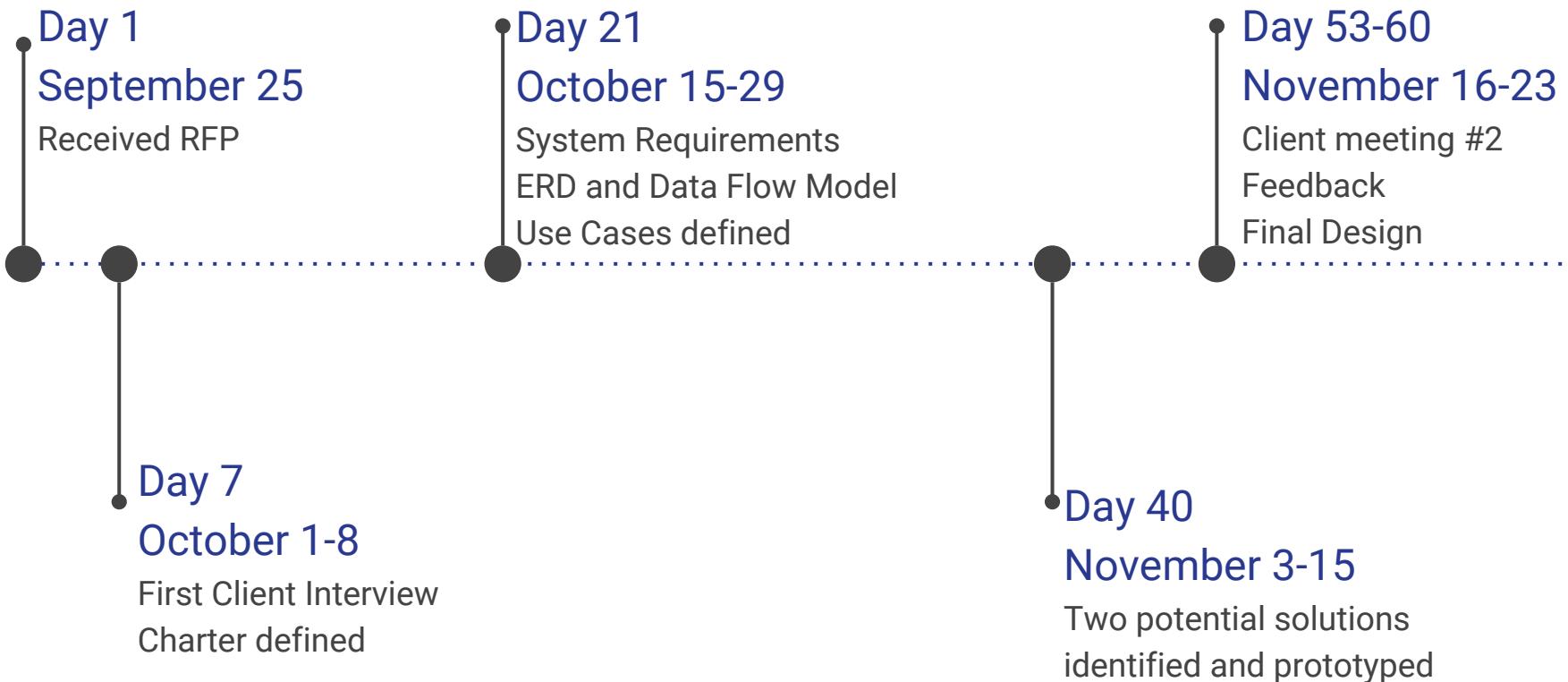
Developed:

- We ended up designing an Excel and Access based solution as the client weighed the pros and cons..
- Access was the most economical and flexible solution as the client already had licenses



Milestones

Scope - Requirements - Design



Software Functionality

Requirements

- BDSBC hosts and needs to organize, track programs and events
- Maintain data for several entities
- Perform searches and generate easy to understand reports
- Check availabilities and other contact information for volunteers

Software Functionality

Use-Cases

1. Create a Program
2. Register for a Program
3. Monthly Report

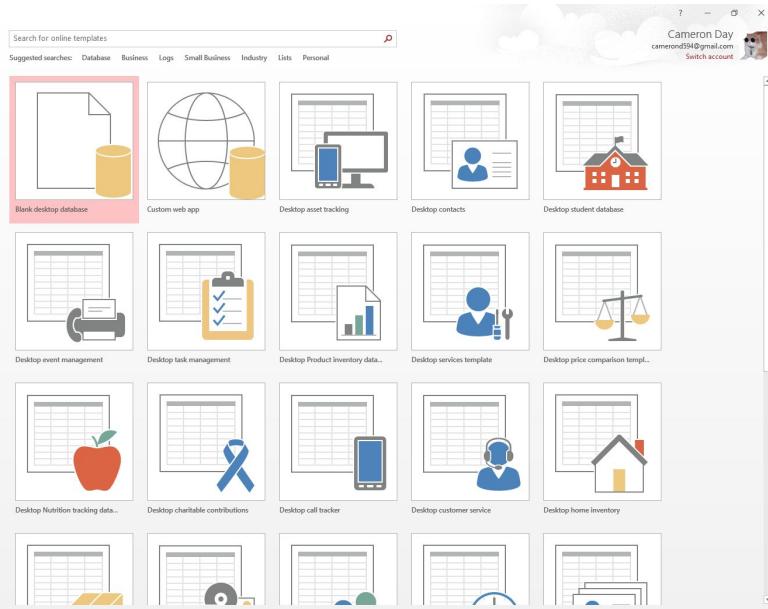
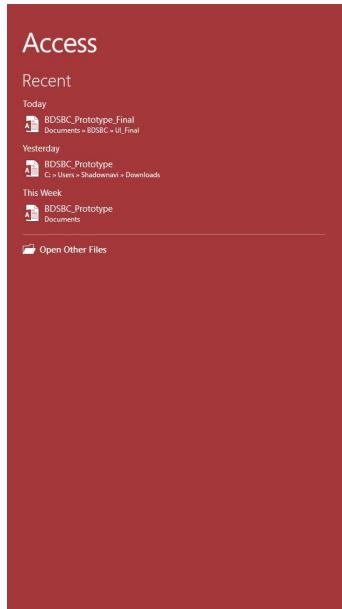


Software Functionality

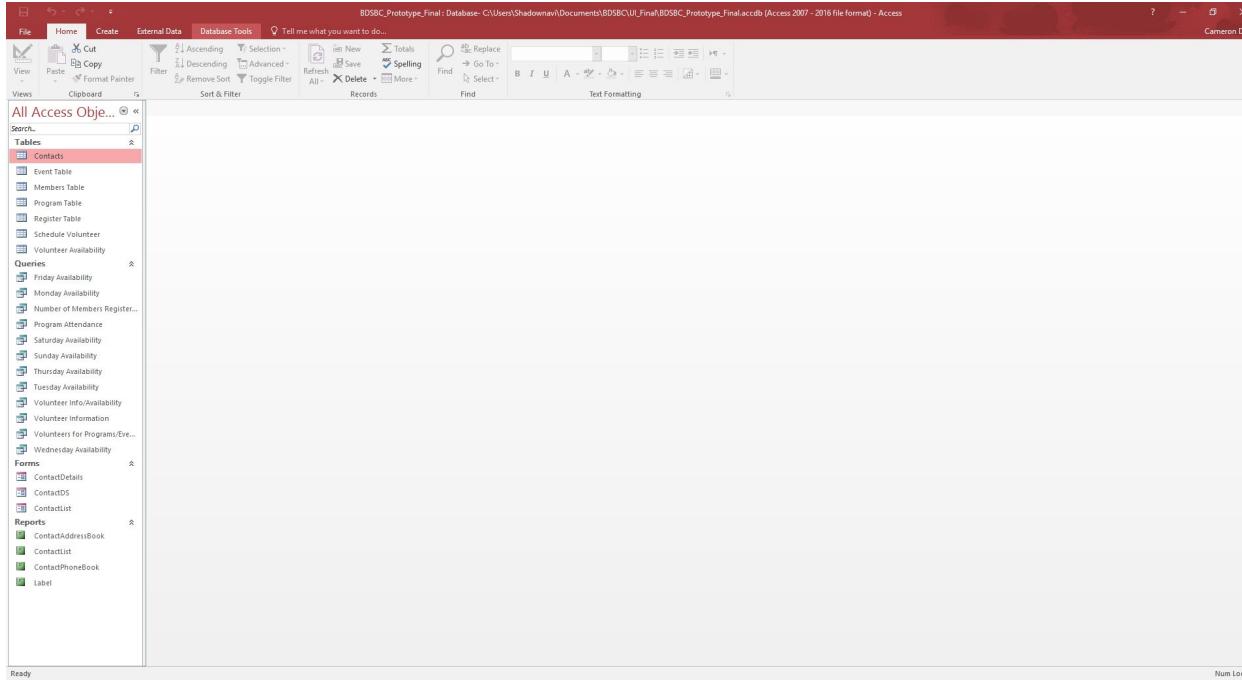
Use-Cases

1. Create a Program
2. Register for a Program
3. Monthly Report

Create a Program



Create a Program - Open Access



Create a Program - Open Program Table

The screenshot shows a Microsoft Access application window titled "BDSBC_Prototype_Final Database - C:\Users\Shadownav\Documents\BDSBC\U_Final\BDSBC_Prototype_Final.accdb [Access 2007 - 2016 file format] - Access". The ribbon menu is visible at the top, and the left pane displays the "All Access Objects" navigation pane with categories like Tables, Queries, Forms, and Reports. The main area is a "Program Table" in Datasheet View, showing the following data:

ID	ProgID	ProgName	Date-Initiativ	Address	Key_Contact	AttendNum	Click to Add
1	10	Teens	Thursdays	Quadra Island	Anna Smith	0	
2	20	Women	Tuesdays	Quadra Island	Anna Smith	0	
3	30	CoEd	Tuesdays	Centennial Lan	Janna Duncan	0	
*	(New)					0	

At the bottom of the screen, there is a decorative graphic consisting of overlapping red triangles.

Create a Program - Fill out Record

Screenshot of Microsoft Access 2016 showing the "Program Table" in Datasheet View. The table has columns: ID, ProgramID, ProgramName, DateInitiated, Address, KeyContact, AttendeeNum, and Click to Add. There are four records:

ID	ProgramID	ProgramName	DateInitiated	Address	KeyContact	AttendeeNum	Click to Add
1	10	Teens	Thursdays	Quadrilla Island	Anna Smith	0	
2	20	Women	Tuesdays	Quadrilla Island	Anna Smith	0	
3	30	CoEd	Tuesdays	Centennial Lan Janna Duncan		0	
4	40	Teens	Wednesdays	University of V.	Cameron Day	0	

The record for ID 4 is currently selected. The status bar at the bottom left shows "Record: 4 of 4".

Create a Program - Availability Query

The screenshot shows the Microsoft Access 2010 interface with the 'Query Tools' ribbon selected. The main area displays a query named 'Wednesday Availability' in the 'Program Table' tab. The SQL code for the query is:

```
SELECT Contact.FirstName, Contact.LastName, Contact.EmailAddress, [Volunteer Availability].Wednesday  
FROM [Volunteer Availability] INNER JOIN Contact ON [Volunteer Availability].EmailAddress = Contact.EmailAddress;
```

The left pane lists various database objects including tables like 'Contacts', 'Event Table', 'Members Table', and 'Program Table', as well as queries such as 'Friday Availability', 'Monday Availability', and 'Wednesday Availability'. The 'Wednesday Availability' query is currently selected.

Create a Program - Availability Result

EDSBC_Prototype_Final : Database: C:\Users\Shadownav\Documents\EDSBC\U_Fin\EDSBC_Prototype_Final.accdb (Access 2007 - 2016 file format) - Access

File Home Create External Data Database Tools Tell me what you want to do... Cameron Day

View Paste E Copy Filter Ascending Selection Advanced Get New Totals Refresh Save Spelling Find Go To... More... Sort & Filter Remove Sort Toggle Filter Find Select... Text Formatting

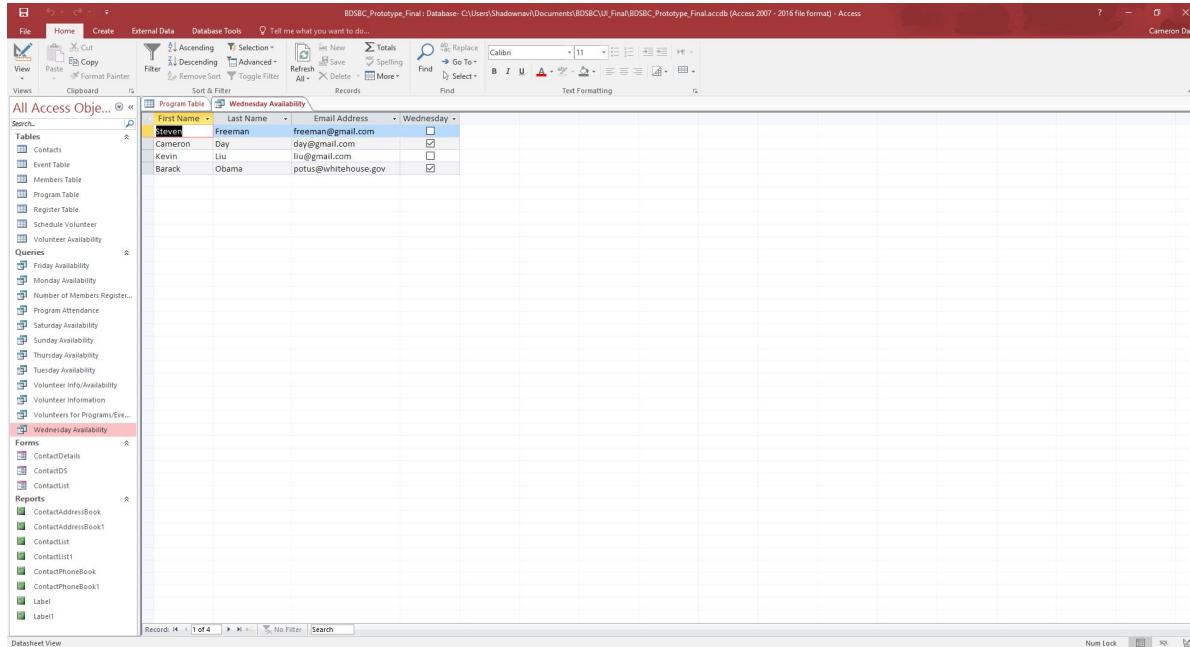
All Access Obj... Tables Program Table Wednesday Availability

First Name : Last Name : Email Address : Wednesday :

First Name	Last Name	Email Address	Wednesday
Steven	Freeman	freeman@gmail.com	<input type="checkbox"/>
Cameron	Day	day@gmail.com	<input checked="" type="checkbox"/>
Kevin	Liu	liu@gmail.com	<input type="checkbox"/>
Barack	Obama	potus@whitehouse.gov	<input checked="" type="checkbox"/>

Sessions Contacts Event Table Members Members Table Program Table Register Table Schedule Volunteer Volunteer Availability Queries Friday Availability Monday Availability Number of Members Register... Program Attendance Saturday Availability Sunday Availability Thursday Availability Tuesday Availability Wednesday Availability Volunteer Info Availability Volunteer Information Volunteers for Programs/Eve... Wednesday Availability Forms ContactDetails ContactID ContactList Reports ContactAddressBook ContactAddressBook1 ContactList1 ContactList11 ContactPhoneBook ContactPhoneBook1 Label Label1

Data-sheet View Record: 1 of 4 > No Filter Search Num Lock



First Name	Last Name	Email Address	Wednesday
Steven	Freeman	freeman@gmail.com	<input type="checkbox"/>
Cameron	Day	day@gmail.com	<input checked="" type="checkbox"/>
Kevin	Liu	liu@gmail.com	<input type="checkbox"/>
Barack	Obama	potus@whitehouse.gov	<input checked="" type="checkbox"/>

Create a Program - Schedule Volunteers

The screenshot shows a Microsoft Access application window titled "EDSBC_Prototype_Final Database: C:\Users\Shadowman\Documents\EDSBC\UI\Final\EDSBC_Prototype_Final.accdb (Access 2007 - 2016 file format) - Access". The main area displays a table named "Schedule Volunteer" with the following data:

ID	Event_ID	Volunteer_ID
1	1	1
2	10	2
3	20	3
4	20	2
5	40	(New)

The "Schedule Volunteer" table has three columns: ID, Event_ID, and Volunteer_ID. The "Event_ID" column contains values 1, 10, 20, 20, and 40 respectively. The "Volunteer_ID" column contains values 1, 2, 3, 2, and "(New)". The row with ID 5 is currently selected.

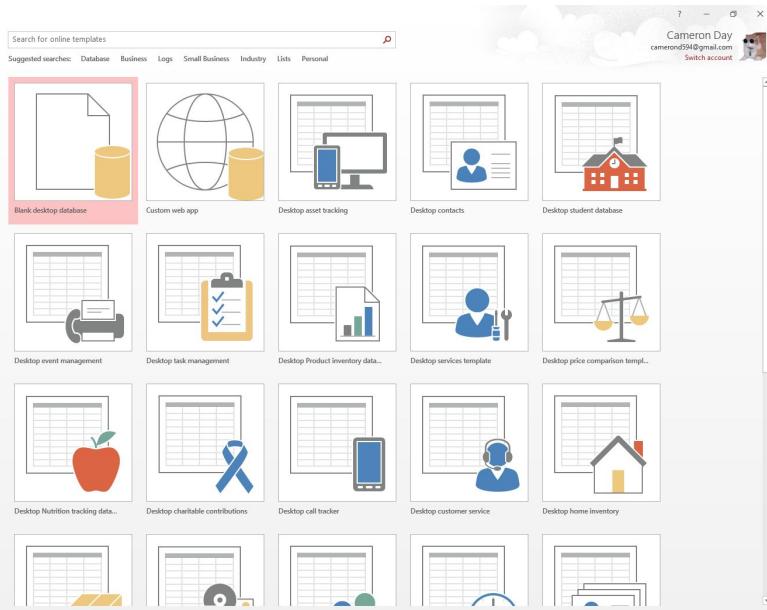
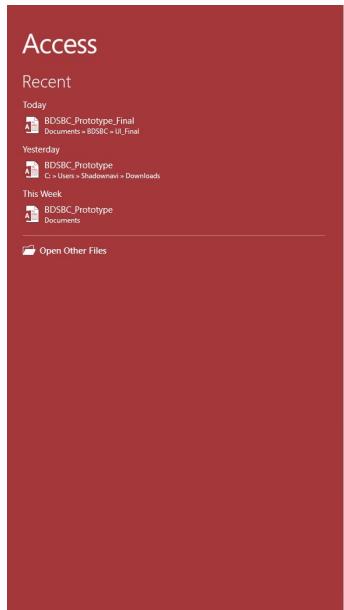
The Access ribbon at the top includes tabs for File, Home, Create, External Data, Database Tools, Fields, and Table. The "Home" tab is selected. The "Table Tools" ribbon shows "Fields" and "Table" tabs. The status bar at the bottom indicates "Record: 14 of 5 of 5" and "No Filter".

Software Functionality

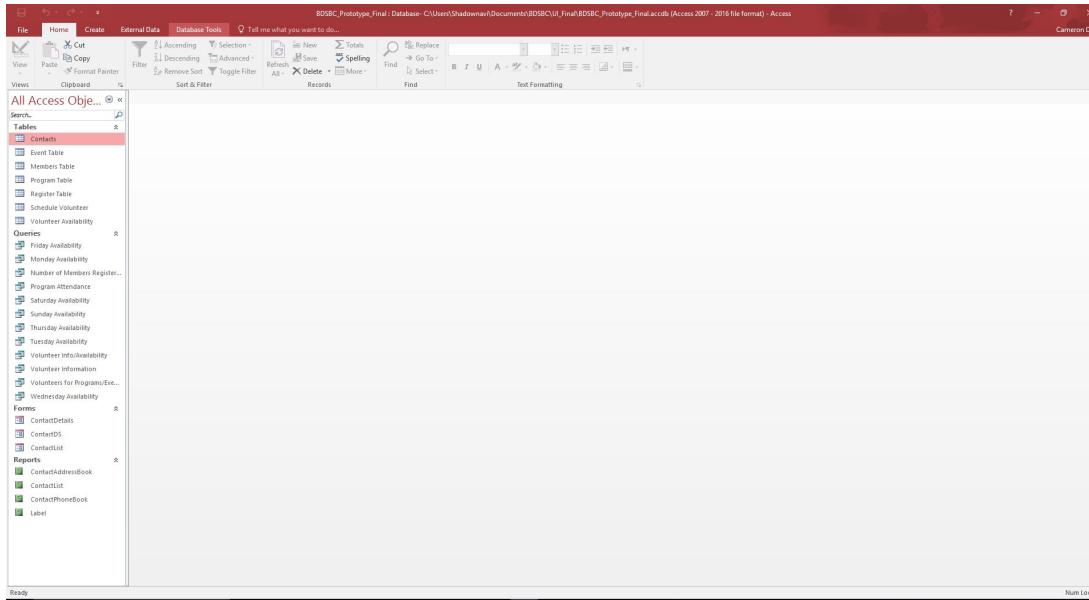
Use-Cases

1. Create a Program
2. **Register for a Program**
3. Monthly Report

Register for a Program



Register for a Program - Open Access



Register for a Program - Retrieve Member Info

Screenshot of Microsoft Access 2010 showing the "Members Table" in Datasheet View.

The table has columns: Member_ID, FirstName, Phone#, and E_Mail.

The data in the table is:

Member_ID	FirstName	Phone#	E_Mail
1	Lorraine		
2	Janice		
3	Madison		
4	Ariana		
5	Crystal		
6	Christa		
7	Camilla		
8	Kaitlyn		
9	Sydney		
10	Diyana		
11	Jamie		
12	Anique		
13	Angela		
14	Tracey		
15	Darcy		
16	Ben		
17	Jason	250-472-4192	
18	Jon		
19	Zac		
20	Zane		
21	Matt		
22	Kevin		

Record 17 (Jason) is selected.

The status bar at the bottom shows: Records: 17 of 22 | No Filter | Search | Num Lock.

Register for a Program - Open Register Table

The screenshot shows a Microsoft Access application window titled "BDSRC_Prototype_Final | Database: C:\Users\Shakoorwani\Documents\BDSFC1\Final\BDSRC_Prototype_Final.accdb (Access 2007 - 2016 file format) - Access". The ribbon menu is visible at the top, and the left pane displays the navigation pane with various tables, queries, forms, and reports. The main area shows the "Register Table" in Datasheet View. The table has columns: RegID, Prog_Event, Member_ID, Date_Time, and Click_to_Add. The data consists of 13 rows, with the last row being the current record being edited, indicated by a blue selection bar.

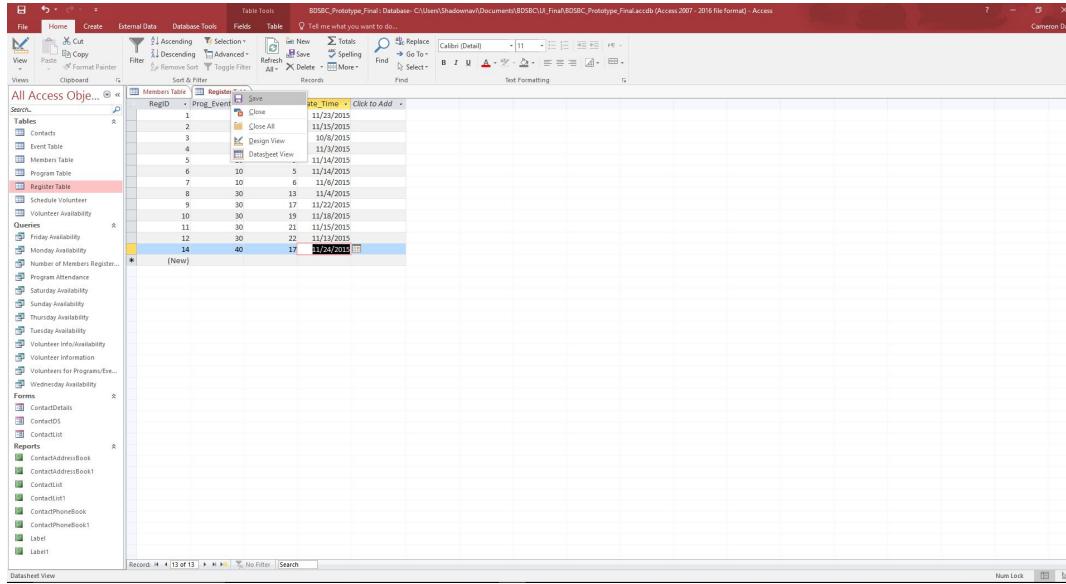
RegID	Prog_Event	Member_ID	Date_Time	Click to Add
1	10	1	11/23/2015	
2	10	4	11/15/2015	
3	10	8	10/8/2015	
4	10	3	11/2/2015	
5	10	9	11/13/2015	
6	10	5	11/14/2015	
7	10	6	11/6/2015	
8	30	13	11/4/2015	
9	30	17	11/22/2015	
10	30	19	11/18/2015	
11	30	21	11/15/2015	
12	30	22	11/13/2015	

Register for a Program - Register Member

The screenshot shows a Microsoft Access application window titled "BDSBC_Prototype_Final". The main area displays a table named "Register Table" in Datasheet View. The table has four columns: "RegID", "Prog_Event", "Member_ID", and "Date_Time". The data consists of 15 rows, with the last row (RegID 13) being edited. The "Date_Time" column contains dates ranging from 11/23/2015 to 11/24/2015. The "Member_ID" column contains values 10, 40, and 17. The "Prog_Event" column contains values 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, and 13. The "RegID" column contains values 1 through 13. The status bar at the bottom indicates "Record: 14 of 15".

RegID	Prog_Event	Member_ID	Date_Time
1	10	1	11/23/2015
2	10	4	11/15/2015
3	10	8	10/8/2015
4	10	3	11/9/2015
5	10	9	11/10/2015
6	10	5	11/14/2015
7	10	6	11/6/2015
8	30	13	11/4/2015
9	30	17	11/22/2015
10	30	19	11/18/2015
11	30	21	11/15/2015
12	30	22	11/13/2015
13	40	17	11/24/2015

Register for a Program - Save Register Data



The screenshot shows a Microsoft Access application window titled "BDSBC_Prototype_Final : Database - C:\Users\Shadowman\Documents\BDSBCU.Final\BDSBC_Prototype_Final.accdb (Access 2007 - 2010 file format) - Access". The menu bar includes File, Home, Create, External Data, Database Tools, Fields, Table, and a search bar. The left pane displays the "All Access Objects" navigation pane with various tables and forms listed. The main area shows the "Registers" table in Datasheet View. The table has three columns: "RegID", "Date", and "Click to Add". The data consists of 13 rows, numbered 1 through 13. Row 14 is currently selected, indicated by a blue selection bar. The "Date" column contains dates such as 11/27/2015, 10/8/2015, 11/3/2015, 11/14/2015, 11/15/2015, 11/17/2015, 11/22/2015, 11/18/2015, 11/15/2015, 11/15/2015, 11/17/2015, 11/24/2015, and 11/24/2015. The "Click to Add" column contains a single value, "17". At the bottom of the datasheet, there is a footer bar with buttons for Record, Search, and Num Lock.

RegID	Date	Click to Add
1	11/27/2015	
2	10/8/2015	
3	11/3/2015	
4	Design View	
5	Datasheet View	
6	10	5
7	10	5
8	30	13
9	30	17
10	30	19
11	30	21
12	30	22
13	30	11/17/2015
14	40	17
(New)		

Register for a Program - Alt. - Create Member

The screenshot shows a Microsoft Access application window titled "BOSBC_Prototype_Final.accdb". The main area displays the "Members Table" in Datasheet View. The table has four columns: "Member_ID", "Firstname", "Phone#", and "E_Mail". The data consists of 23 rows, with the last row being a new record currently being edited. The "E_Mail" field for the new record contains "flotus@whitehit.com". The status bar at the bottom indicates "Record: 23 of 23".

Member_ID	Firstname	Phone#	E_Mail
1	Lorraine		
2	Jade		
3	Madison		
4	Ariana		
5	Crystal		
6	Ortiza		
7	Camilla		
8	Kathlyn		
9	Sydney		
10	Dynima		
11	Jaime		
12	Anique		
13	Angela		
14	Treacy		
15	Darci		
16	Ben		
17	Jason	250-472-4192	
18	Iren		
19	Zac		
20	Zane		
21	Austin		
22	Kevin		
23	Michelle	250-555-1982	flotus@whitehit.com

Register for a Program - Alt. - Save Member

The screenshot shows a Microsoft Access application window titled "BOSBC_Prototype_Final | Database: C:\Users\Shadowman\Documents\BOSBCUI\Final\BOSBC_Prototype_Final.accdb (Access 2007 - 2016 file format) - Access". The main area displays a table named "Members" in Datasheet View. The table has columns: "Phone#", "E-Mail", and "Click to Add". The data consists of 23 rows, each containing a unique identifier (1 through 23) and a name. The last row, number 23, is highlighted in blue and contains the values "23 Michelle" in the "Phone#" column and "Rotus@whiteh" in the "E-Mail" column. The status bar at the bottom indicates "Record: 14 of 23 of 23".

	Phone#	E-Mail
1	6 Ohissa	
2	7 Camilla	
3	8 Kaitlyn	
4	9 Sydney	
5	10 Dyania	
6	11 Jamie	
7	12 Amarie	
8	13 Angela	
9	14 Tracey	
10	15 Darcy	
11	16 Bert	
12	17 Jason	250-472-4192
13	18 Scott	
14	19 Zac	
15	20 Zane	
16	21 Matt	
17	22 Kevin	
18	23 Michelle	Rotus@whiteh
(New)		

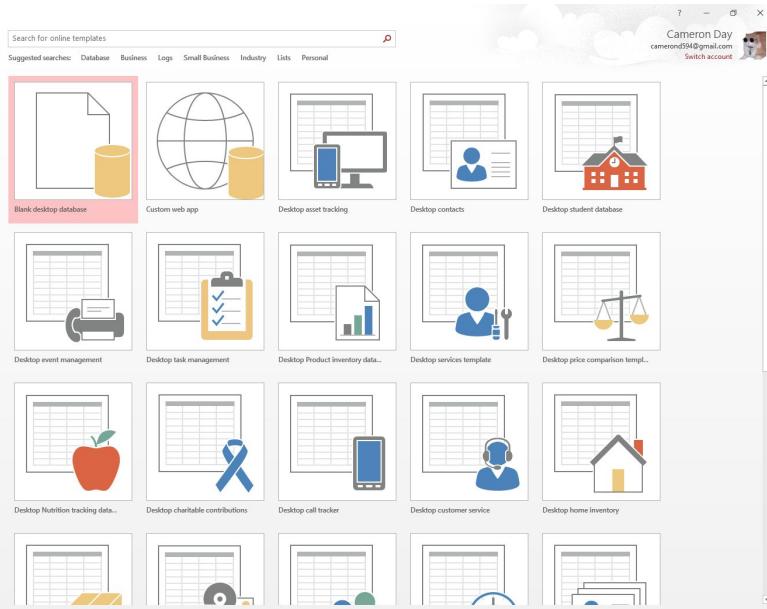
Software Functionality

Use-Cases

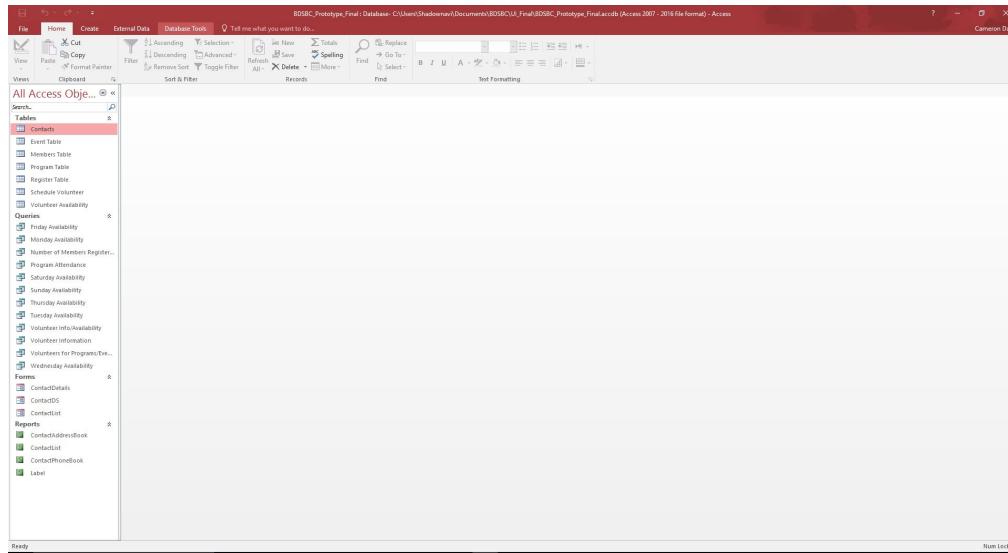
1. Create a Program
2. Register for a Program
3. **Monthly Report**



Monthly Report



Monthly Report - Open Access



Monthly Report - Run Query 1

The screenshot shows the Microsoft Access 2010 interface with a query design window open. The title bar reads "BDSBC_Prototype_Final : Database: C:\Users\Shadowenav\Documents\BDSBC\UI_Final\BDSBC_Prototype_Final.accdb (Access 2007 - 2010 file format) - Access". The ribbon tabs are "File", "Home", "Create", "External Data", "Database Tools", and "Design". The "Design" tab is selected.

The left pane displays the "All Access Objects" navigation pane, which includes sections for "Tables", "Queries", "Forms", and "Reports". Under "Tables", several tables are listed: Contacts, Event Table, Members Table, Program Table, Register Table, schedule_volunteer, and volunteer_availability. Under "Queries", there are multiple entries, with "Volunteers for Programs Events..." highlighted in red. Under "Forms", "ContactDetails", "ContactID5", and "ContactList" are listed. Under "Reports", several reports are listed, including ContactAddressBook, ContactAddressBook1, ContactList, ContactList1, ContactPhoneBook, ContactPhoneBook1, Label, and Label1.

The main area of the window shows the SQL query code:

```
SELECT DISTINCTROW [Program Table].[ProgID], [Program Table].[ProgramName], [Program Table].Address, Count(*) AS [Count Of Register Table]
FROM [Register Table] INNER JOIN [Program Table] ON [Register Table].[Prog_Event_ID]=[Program Table].[ProgID]
GROUP BY [Program Table].[ProgID], [Program Table].[ProgramName], [Program Table].Address, [Register Table].[Prog_Event_ID];
```

Monthly Report - Query 1 Results

File Home Create External Data Database Tools Tell me what you want to do... Cameron Day

View Paste Copy Filter Advanced... Refresh All... Delete More... Totals Find Go To... Selection Selection... Remove Sort Toggle Filter Find & Replace Cell Color Font Size Alignment Text Formatting

All Access Obj... Search: Tables Contacts Event Table Members Table Program Table Register Table Schedule Volunteer Committee Availability Questions Friday Availability Monday Availability Number of Members Registered Program Attendance Saturday Availability Sunday Availability Thursday Availability Tuesday Availability Volunteer Info/Availability Volunteer Information Volunteers for Programs Events

Programs Events

ProgID ProgName Address Count Of Registrants

ProgID	ProgName	Address	Count Of Registrants
10	Teens	Quadrailand	7
30	CoEd	Centennial Lan	5
40	Teens	University of V	1

Records: 14 of 3 | No Filter | Search | Num Lock

Monthly Report - Run Query 2

The screenshot shows the Microsoft Access 2007 interface in Design view. The title bar indicates the database is 'BDSBC_Prototype_Final' and the file type is 'Access 2007 - 2016 file format'. The ribbon tabs include File, Home, Create, External Data, Database Tools, and Design. The Design tab is selected, showing various query tools like Union, Insert Rows, Insert Columns, Delete Rows, Delete Columns, Data Definition, Totals, Parameters, and Table Names.

The left pane displays the 'All Access Objects' navigation pane with categories: Tables, Queries, Forms, and Reports. Under 'Queries', the query 'Volunteers for Programs/Events' is selected and highlighted with a red border. The main workspace shows the SQL code for the query:

```
SELECT [Program Table].ProgID, [Program Table].ProgName, [Program Table].[Date Initiated], [Program Table].Address, [Schedule Volunteer].Volunteer_ID, Contacts.FirstName, Contacts.LastName
FROM [Program Table] INNER JOIN [Schedule Volunteer] ON Contacts.ID = [Schedule Volunteer].Volunteer_ID
INNER JOIN [Program Table] ON [Program Table].ProgID = [Schedule Volunteer].ProgID
INNER JOIN [Event] ON [Event].Event_ID = [Schedule Volunteer].Event_ID;
```

The status bar at the bottom shows 'Form View'.

Monthly Report - Query 2 Results

EDSBC_Prototype_Final | Database - C:\Users\Shadow\Documents\EDSBCUI_Final\EDSBC_Prototype_Final.accdb (Access 2007 - 2016 file format) - Access

Cameron Day

File Home Create External Data Database Tools Tell me what you want to do... Filter Advanced Sort & Filter Remove Sort Toggle Filter Refresh All+ More... Find Go To... Selection Selection+ New Save Spelling Find Go To... Selection+ Replace Text Formatting

All Access Obj...

Views Clipboard Sort & Filter Records Find

Tables Contacts Event Table Members Table Program Table Register Table Schedule Volunteer Volunteer Availability

Queries Friday Availability Monday Availability Number of Member Register... Program Attendance Saturday Availability Sunday Availability Thursday Availability Tuesday Availability Volunteer info/Availability Volunteer Information

Forms Volunteers for Programs/Eve... Wednesday Availability

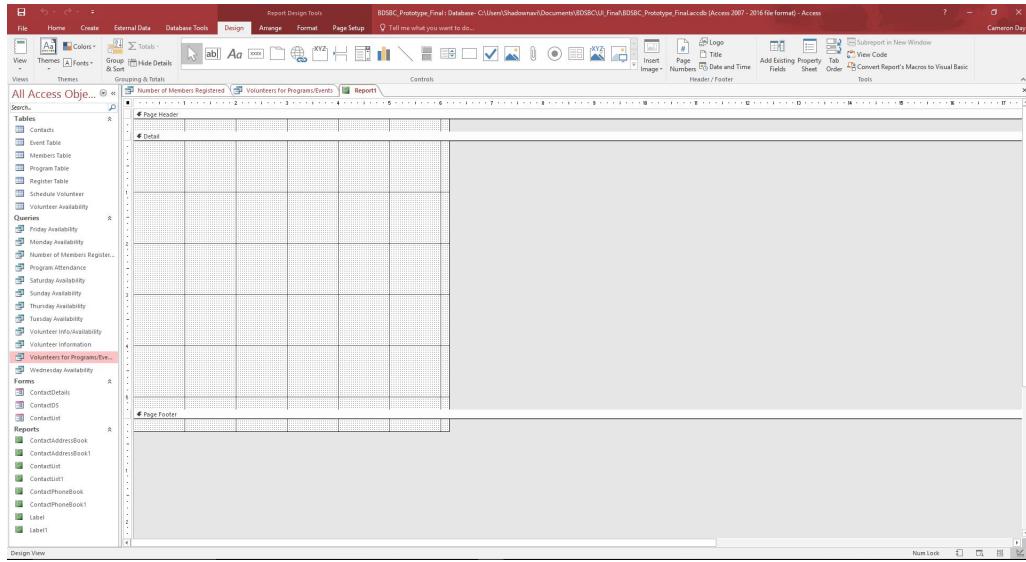
Reports ContactDetails ContactDS ContactList

Datasheet View

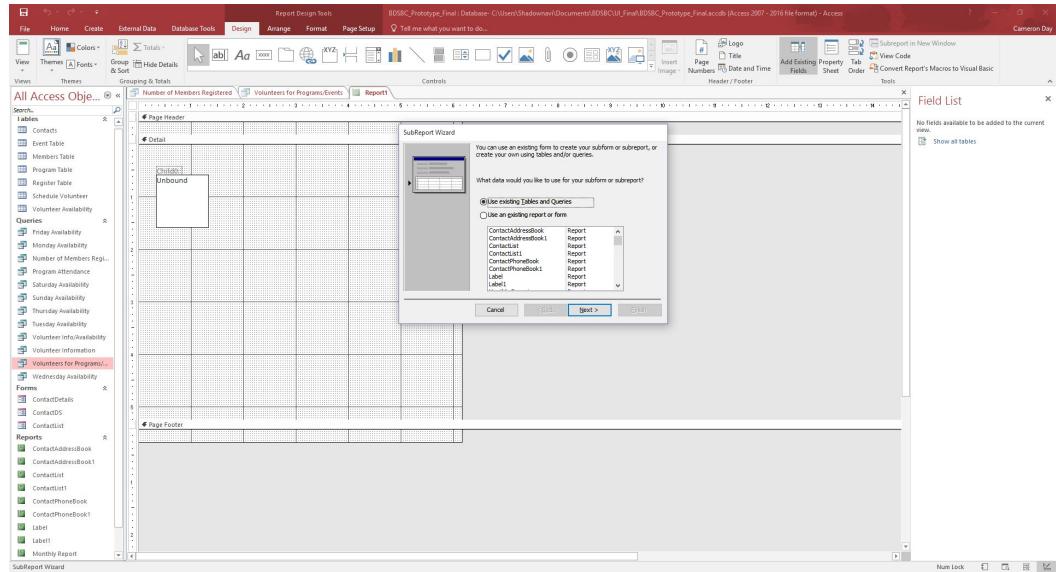
Records: 1 of 5 | Back | Next | No Filter | Search | Num Lock

ProgID	Program Name	Date Initiated	Address	Volunteer_ID	First Name	Last Name
10 Teens	Thursdays	Quadrilla Island	1	2. Cameron	Freeman	
20 Women	Tuesdays	Quadrilla Island	2	3 Kevin	Liu	
20 Women	Tuesdays	Quadrilla Island	2	2. Cameron	Day	
40 Teens	Wednesdays	University of V	4	4 Barack	Obama	

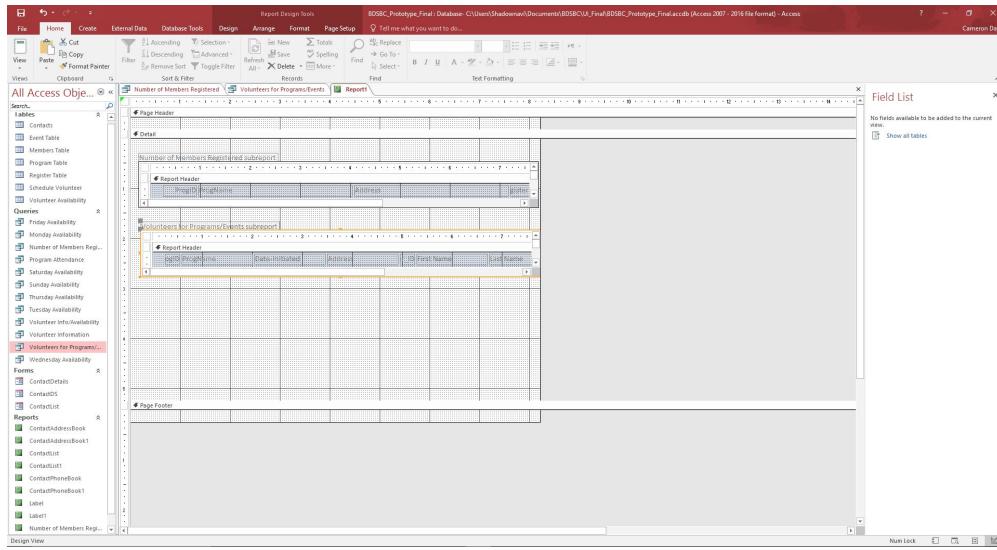
Monthly Report - Create Report Design



Monthly Report - Create Subreports



Monthly Report - Add Subreports to Report



Monthly Report - Compile Report

Screenshot of Microsoft Access 2007 showing a report design for a monthly report.

The window title is "BDSBC_Prototype_Final.accdb [Access 2007 - 2016 file format] - Access". The ribbon tabs are File, Home, Create, External Data, Database Tools, Design, Arrange, Format, and Page Setup. The Page Layout tab is selected.

The report is titled "Monthly Report" and contains two subreports:

- Number of Members Registered subreport:**

ProgID	Program	Address	Count Of Register Table
10	Teens	Quadra Island CC	7
30	CoEd	Centennial Langford	5
40	Teens	University of Victoria	1
- Volunteers for Programs/Events subreport:**

ProgID	Program	Date-Initiated	Address	r_ID	First Name	Last Name
10	Teens	Thursdays	Quadra Island CC	1	Steven	Freeman
10	Teens	Thursdays	Quadra Island CC	2	Cameron	Day
20	Women	Tuesdays	Quadra Island CC	3	Kevin	Liu
20	Women	Tuesdays	Quadra Island CC	2	Cameron	Day
40	Teens	Wednesdays	University of Victoria	4	Barack	Obama

The left pane shows the "All Access Objects" navigation pane with categories like Tables, Queries, Forms, Reports, and Macros. The "Volunteers for Programs/Events" report is highlighted in red.

Monthly Report - Save Report

EDSBC_Prototype_Final : Database - C:\Users\Shadowman\Documents\EDSBC\UI_Final\EDSBC_Prototype_Final.accdb (Access 2007 - 2016 file format) - Access

Cameron Day

File Home Create External Data Database Tools Tell me what you want to do... Filter Ascending Selection Descending Advanced... Remove Sort Toggle Filter Refresh Save Spelling All+ Delete More... Find Go To + Select... Sort & Filter Records

All Access Obj... Search... Tables Contacts Event Table Members Table Program Table Center Table Educate Volunteer Volunteer Availability Queries Friday Availability Monday Availability Number of Members Reg... Program Attendance Saturday Availability Sunday Availability Thursday Availability Tuesday Availability Volunteer Info Availability Volunteer Information Volunteers for Programs... Wednesday Availability Forms ContactDetails ContactDS ContactList ContactReport Reports ContactAddressBook ContactAddressBook1 ContactList1 ContactList2 ContactPhoneBook ContactPhoneBook1 Label Label1 Monthly Report

Number of Members Registered subreport

ProgID	ProgramName	Address	gister table
10	Teens	Quadra Island CC	7
30	CoEd	Centre	5
40	Teens	University of Victoria	1

Volunteers for Programs/Events subreport

ProgID	ProgramName	Date-Initiated	Address	r_ID	First Name	Last Name
10	Teens	Thursdays	Quadra Island CC	1	Steven	Freeman
10	Teens	Thursdays	Quadra Island CC	2	Cameron	Dey
20	Women	Tuesdays	Quadra Island CC	3	Kevin	Liu
20	Women	Tuesdays	Quadra Island CC	2	Cameron	Dey
40	Teens	Wednesdays	University of Victoria	4	Barack	Obama

Num Lock

The screenshot displays a Microsoft Access application window. The title bar indicates the database is 'EDSBC_Prototype_Final' located at 'C:\Users\Shadowman\Documents\EDSBC\UI_Final\EDSBC_Prototype_Final.accdb'. The ribbon menu includes 'File', 'Home', 'Create', 'External Data', 'Database Tools', and a search bar. The 'File' tab is selected. The left pane shows a tree view of 'All Access Objects' including tables, forms, reports, and queries. Two reports are currently open: 'Number of Members Registered' and 'Volunteers for Programs/Events'. The 'Number of Members Registered' report has three data rows: 10 Teens at Quadra Island CC (7), 30 CoEd at Centre (5), and 40 Teens at University of Victoria (1). The 'Volunteers for Programs/Events' report has six data rows: 10 Teens on Thursdays at Quadra Island CC (1 Steven Freeman, 2 Cameron Dey), 20 Women on Tuesdays at Quadra Island CC (3 Kevin Liu, 2 Cameron Dey), and 40 Teens on Wednesdays at University of Victoria (4 Barack Obama).

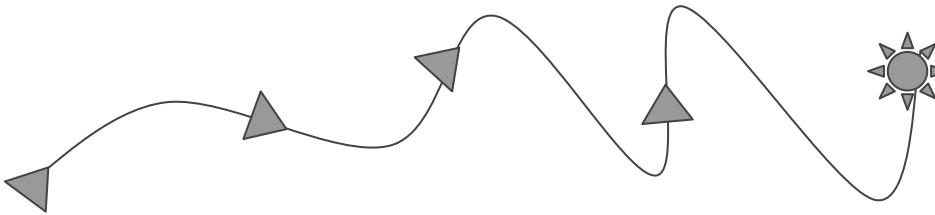
Software Functionality

Use-Cases

1. Create a Program
2. Register for a Program
3. Monthly Report



Challenges and Lessons



Background Research

Public Data

- Canada Revenue Agency for Charities
- Previous SW (SUMAC)

We learnt the value of doing ***our own*** research prior to meeting with clients

Staying within Scope

Ideas got too Broad

- Designed tracking of revenue and expenses although this was not needed

We learnt to integrate ***scope check*** into a review process.

Stakeholder Consideration

We didn't consider all stakeholder ***preferences***

- Received mixed information

We learnt to ***weigh stakeholder opinion*** based on their stake in the organization

Challenges and Lessons

Solution Development Time

Time Budgeted

- Problem and Requirements definition were heavily time favored

We learnt to reference our ***gantt chart*** frequently!

Bias

Reporting Bias

- Had an idea of how “I” would tackle the problem

Learnt to focus on the ***task at hand*** and be conscious of ***biases***

Communication

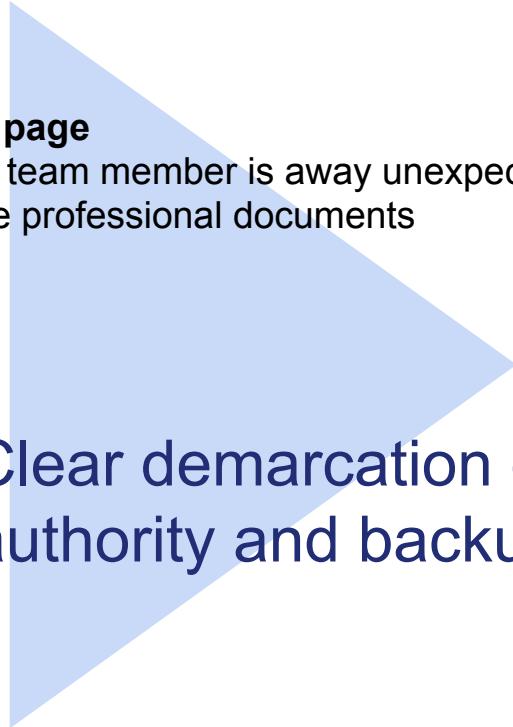
Asynchronous Channels

- Led to confusion

Learnt the value of communicating ***complex information*** in-person

Team Process Challenges

- Keeping everyone on the **same page**
- Having a **contingency plan** if a team member is away unexpectedly
- An **Editor** is a key role to ensure professional documents



Clear demarcation of roles, decision authority and backup is critical.

For Future Course Offerings

Marking Rubrics...

When to Think Solutions...

Background Work Versus Class Work...

Time Required for Context Switching...

Questions?