**Consultants Database Project Summary**

**Background:**

Currently, there is no centralized database for consultants with whom DSFederal has worked or is currently working. With every new project, task order or proposal which requires consultants’ involvement, project manager or proposal manager must manually search the resumes in PDF or Word format, query separate rosters compiled for different projects, or start a lengthy recruiting process. The process is not only labor intensive and time-consuming, but also duplicative that lacks efficiency and accuracy. The time required to find suitable consultants through manual search usually exceeds the time we have for developing a proposal or starting a new project/task. Additionally, many consultants have been contacted by different DSFederal teams to collect the same information (for instance their expertise and prior experience) for different purposes. This not only reflects poorly on DSFederal’s internal coordination, but also poses a risk of losing consultants due to unnecessary burdens.

**Requirements of the project:**

1. A centralized database: Currently, DSFederal has over 200 consultants from HRSA TA IDIQ proposal, GTAP and MCHB. They are valuable resources for our company. Organizing these consultants into a centralized database will speed up customized query to quickly identify qualified consults, and to summarize pertinent information into professional reports. This database will both facilitate internal management and external reporting to the client.
2. Data sources: The data intake comes from different sources:

a) resumes in PDF or word documents;

b) rosters with detailed contact information and additional information not included in resumes;

c) results of past surveys sent to consultants for project-specific qualifications and expertise.

All these documents will need to be extracted, transformed and loaded up to a database.

1. Product Description:

a) A centralized consultant database and a central depositary of the resumes (possibly linked to the database and dashboards);   
b) Excel rosters will be generated from the database for project managers to submit to the clients or for easy organization;   
d) A pipeline or workflow for adding and updating new consultants’ records and resumes;  
e) (Optional) A Tableau dashboard which shows essential information of the consults. The dashboard also allows quick and custom queries of any combination of attributes of the consults (i.e. language + experience with target population + years of experience).

**Deliverables:**

1. A working database in Excel (and PostgreSQL if necessary) with all existing consultants’ data [due by July 26]
2. A dashboard in Power Query enabling project managers to query and filter candidates [due by Aug 9]
3. An Excel Roster summarizing all the consultants’ data [due by Aug 9]
4. A shared location for all resumes (Redmine, or Google Drive or OneDrive) [due by Aug 15]
5. A documentation consisting of instructions for data input workflow and steps, as well as all the configuration, setup and software used [due by Aug 15]
6. Tableau dashboards (optional) [due by Aug 23, if applicable]

**Timeline and Resource:**

1. July 10-Aug 20, 2019
2. Project manager: Yinong Chong;
3. Project owner: Echo Wang (with input from Carly Mensah)
4. Developer: Summer Intern Jing Li
5. Advisor: Sophia Wu