

## **Week 5 - Project Plan (Part 2)**

### **Community Forklift - Material Donation Journey Mapping**

**Team members:** Kavya, Michael, Areeb, Jumar, Morolasaiye

#### **Project Context**

Community Forklift is a nonprofit reuse center that diverts home improvement supplies from landfills and redistributes them affordably to the community. Right now, their donation process runs across multiple systems, which can be confusing for staff and donors and may cause inefficiencies. Our project aims to map the full donor journey, from first contact through post-donation, to spot pain points and gaps. By gathering insights through interviews and meetings, we'll propose clear recommendations to streamline workflows, secure donor data, and improve the donor experience.

#### **Project Summary Abstract**

With this project we will strive to intuitively improve the way Community Forklift sees their material donation process. We will take part in interviews and in person meetings with our contacts in order to gather required information to map the donor journey. We'll then use this information to identify faults in our clients infrastructure, work on solutions to recommend, and propose these recommendations to Community Forklift.

#### **Scope & Deliverables**

| <b>ID</b>  | <b>Milestone</b>                         | <b>Task Description</b>  |
|------------|--|--|
| <b>1.0</b> | <b>Project Initiation &amp; Planning</b> | Define project goals, deliverables, and timeline. Align expectations between UMD team and Community Forklift.        |
| <b>1.1</b> | Conduct Initial Project Briefing         | Meet with the Community Forklift team to review objectives, existing processes, and challenges in the donor journey. |
| <b>1.2</b> | Define Roles & Timeline                  | Assign team responsibilities and develop Gantt charts or project tracker.  |

|            |  |  |
|------------|--|--|
| <b>1.3</b> | Document Project Scope & Deliverables            | Submit finalized scope document outlining objectives, milestones, and what is out of scope.  |
| <b>2.0</b> | <b>Stakeholder Research &amp; Data Gathering</b> | Collect information on donor processes, workflows, and systems currently in use.   |
| <b>2.1</b> | Observe Material Donation Workflow               | Visit the warehouse, take photos, and document on-site donor interactions and data collection practices.   |
| <b>2.2</b> | Conduct Stakeholder Interviews                   | Interview key personnel (e.g., Trey, Martina, warehouse staff) to understand donor engagement processes and challenges.  |
| <b>2.3</b> | Review Data Systems                              | Analyze existing data sources (Podio, Google Calendar, ThriftCart POS, and EveryAction CRM) to understand current information flow. Gather sample data from Community Forklift |
| <b>3.0</b> | <b>Data Analysis &amp; System Evaluation</b>     | Assess and analyze current donor data to identify patterns, inefficiencies, and opportunities for improvement.   |
| <b>3.1</b> | Identify Key Performance Indicators (KPIs)       | Determine metrics for tracking donor engagement and process efficiency.  |
| <b>4.0</b> | <b>Donor Journey Mapping</b>                     | Create a visual map of the complete donor lifecycle, including online and offline touchpoints.   |
| <b>4.1</b> | Define Donor Lifecycle Stages                    | Outline stages from awareness → intent →   |

|     |   |  |
|-----|---|--|
|     |   | scheduling → pickup → post-donation engagement.  |
| 4.2 | Map Touchpoints & Pain Points                   | Identify where donors interact with Community Forklift and where service issues or data loss occurs.         |
| 4.3 | Draft Donor Journey Map                         | Create an initial map using tools such as Figma or Miro.   |
| 5.0 | <b>Recommendations &amp; Final Deliverables</b> | Provide strategic insights to improve donor engagement, information management, and efficiency.              |
| 5.1 | Develop Recommendations                         | Suggest ways to streamline processes, improve data systems, and automate donor engagement.                   |
| 5.2 | Compile Final Report                            | Collect findings, journey maps, gap analysis, and recommendations into a comprehensive final document.       |
| 5.3 | Present Findings                                | Deliver a final presentation summarizing results, insights, and actionable next steps to Community Forklift. |

### Schedule and Work Assignment

| Task               | Subtask / Description  | Team Member(s) | Start Date | Due Date |
|--------------------|--|----------------|------------|----------|
| 1. Kickoff Meeting | Meet with Community Forklift to review project goals, gather background materials, and confirm key contacts. | All            | 9/24       | 9/24     |

|  |   |                           |      |       |
|--|---|---------------------------|------|-------|
| <b>2. Project Planning</b>                       | Schedule follow-up meetings and develop internal communication plans.   | Kavya                     | 9/25 | 10/1  |
|  | Assign roles and responsibilities to each team member.  | All                       | 9/30 | 10/2  |
|  | Create Gantt chart and project tracker (Google Sheets or Excel).  | Kavya                     | 10/2 | 10/4  |
| <b>3. On-Site Visit</b>                          | Conduct walk-through of warehouse and operations; take notes, photos, and observe workflow.                                       | Kavya, Jumar              | 10/3 | 10/3  |
|  | Identify potential donor touchpoints observed during visit.   | Kavya                     | 10/4 | 10/6  |
| <b>4. Data Access &amp; Documentation Review</b> | Obtain sample donor data and ensure privacy permissions.  | Michael                   | 10/4 | 10/10 |
|  | Request documentation such as donation request reports (accepted, rejected, pending), training materials, and internal workflows. | Michael                   | 10/4 | 10/10 |
|  | Review walkthroughs of Podio and Google Calendar systems to understand data flow.   | Systems Evaluator (Jumar) | 10/6 | 10/12 |
| <b>5. Research Phase</b>                         | Draft preliminary donor journey stages using Miro or Figma based on field notes.  | Morolasaide               | 10/8 | 10/15 |

|                                       |   |                      |       |       |
|---------------------------------------|---|----------------------|-------|-------|
|                                       | Conduct stakeholder interviews with staff to understand challenges and inefficiencies.              | Areeb                | 10/10 | 10/17 |
|                                       | Identify inefficiencies in the donation process (e.g., scheduling, communication gaps, data entry). | Areeb                | 10/17 | 10/19 |
| <b>6. Data Analysis</b>               | Organize and clean provided donor and material data.  | Morolasaiye          | 10/18 | 10/20 |
|                                       | Identify inefficiencies or missing data points related to donor interactions.                       | Michael, Jumar       | 10/20 | 10/22 |
|                                       | Analyze data trends such as pickup frequency, item type, donor geography, and warehouse volume.     | Michael, Jumar       | 10/22 | 10/25 |
| <b>7. Journey Mapping</b>             | Draft visual representation of donor lifecycle journey map (online + offline touchpoints).          | Jumar, Kavya         | 10/26 | 11/5  |
|                                       | Review and refine journey maps as a group.  | All                  | 11/5  | 11/7  |
| <b>8. Gap &amp; Workflow Analysis</b> | Compare current workflows and data systems against ideal donor experience.                          | Areeb                | 11/7  | 11/12 |
|                                       | Identify success metrics and KPIs for donor engagement and efficiency.                              | Michael, Morolasaiye | 11/10 | 11/14 |

|  |  |         |       |       |
|--|--|---------|-------|-------|
| <b>9. Recommendations &amp; Final Deliverables</b> | Draft recommendations for improved data collection, system integration, and engagement strategies. | All     | 11/10 | 11/16 |
|  | Write a final summary of findings and solutions in report form.                                    | Areeb   | 11/12 | 11/16 |
|  | Prepare data visualizations to include in the report.  | Michael | 11/13 | 11/17 |
|  | Combine sections and proofread the final report.   | Kavya   | 11/15 | 11/17 |
| <b>10. Final Submission &amp; Presentation</b>     | Submit final report and presentation slides to professor.  | All     | 11/17 | 11/20 |
|  | Present final findings and donor journey recommendations to Community Forklift.                    | All     | 12/3  | 12/5  |

## Tasks and Subtasks

Goal: Develop a donor journey map and recommendations for Community Forklift

1. Phase 1: Planning Kickoff & Setup
  - 1.1. Meet with Community Forklift staff to review goals and gather workflow materials
  - 1.2. Create shared Google Drive folder for documents and notes
  - 1.3. Set up team calendar with deadlines and check-in meetings
  - 1.4. Assign team roles and document responsibilities in Google Sheet
2. Phase 2: Analysis
  - 2.1. On-Site Observation
  - 2.2. Visit warehouse to observe donor intake, pickup scheduling, and storage workflow
  - 2.3. Take photos and detailed notes of donation handling and staff process

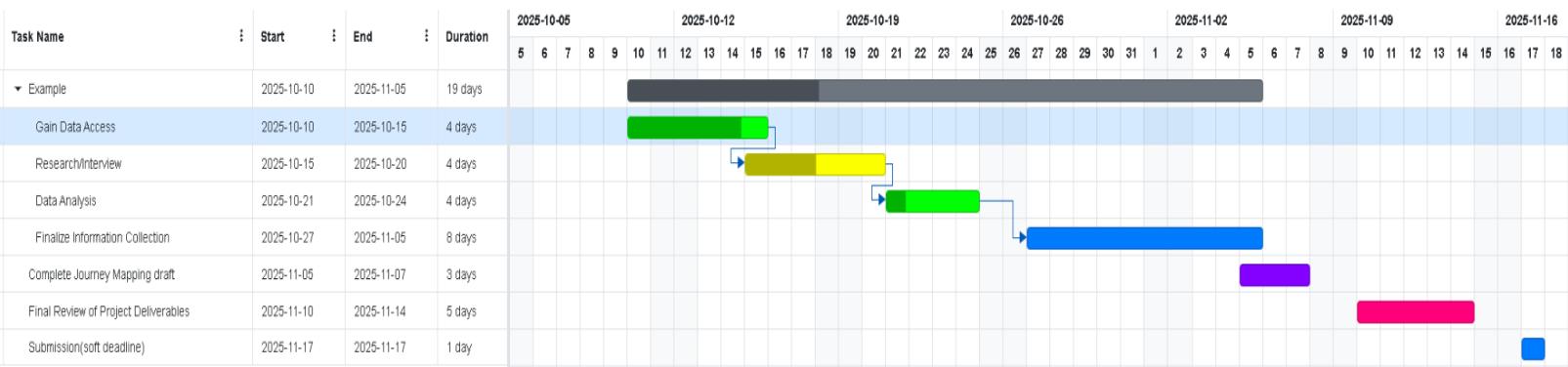
3. 3. Data Collection & Review
  - 3.1. Obtain sample donor data (Podio, Google Calendar, Excel logs) and confirm privacy approval
  - 3.2. Request internal reports, process documentation, and workflow instructions
  - 3.3. Conduct interviews with staff and, if possible, donors; summarize key points
4. 4. Data Analysis
  - 4.1. Clean and organize collected data
  - 4.2. Identify trends (donation type, pickup frequency, geography)
  - 4.3. Highlight inefficiencies or missing data points
5. Phase 3: Design Donor Journey Map
  - 5.1. Draft initial donor journey map in Miro or Figma
  - 5.2. Add online/offline touchpoints, pain points, and workflow steps
  - 5.3. Share draft internally and revise based on feedback
6. Phase 4: Development Recommendations & Report
  - 6.1. Brainstorm solutions to improve donor engagement and process efficiency
  - 6.2. Write report including journey map, data insights, and actionable recommendations
  - 6.3. Create charts and visuals in Google Sheets or Canva for data trends
7. 7. Mid-Semester Presentation
  - 7.1. Build Google Slides deck summarizing analysis and draft journey map
  - 7.2. Rehearse as team and present to class/client for feedback
8. Phase 5: Delivery Final Deliverables
  - 8.1. Update journey map and report based on mid-semester feedback
  - 8.2. Submit final PDF/Figma map and written report (Google Docs)
  - 8.3. Prepare final Google Slides presentation and deliver to Community Forklift

## **Risk Management and Mitigation Plan**

The team will encounter various obstacles while working on this project because it involves different systems and stakeholders. We will identify these potential issues at the beginning to keep our project on schedule while maintaining effective communication with Community Forklift.

- Limited data access: The client operates multiple software systems which restrict access to certain information. The team will verify view-only access rights at the beginning of the project and obtain sample data when complete system access proves impossible.
- Time constraints: Our project operates under a brief time frame which will conclude on November 19. Our team will monitor progress through a shared management sheet while establishing internal deadlines which precede official milestones by seven days.
- Communication Gaps: The team will prevent misunderstandings through brief summary emails that summarize all client meetings. The team will stay informed about project choices and progress updates through this system.
- Scheduling Delays: The staff members at Community Forklift maintain active schedules which might cause interview dates to change. We will maintain flexible communication by providing various meeting options while using email and phone to keep everyone on the same page.
- Data Privacy and Security: The organization maintains donor information which contains potentially sensitive personal details. The project team will maintain complete data security for all information received from the organization while keeping all identifying details restricted to members of the project team.
- Scope of the project: On 10/02, the team discussed with the professor and TA and are still determining the scope of the project, whether it be mapping the whole forklift journey, updating donors about their contributions, providing input about software systems that the community uses, etc. The project team will further discuss the scope of the project with the forklift community leaders in detail in order to prevent any issues with them in the future regarding this matter.

## Gantt Chart



## Contributions

Kavya- Sent email to set a meeting for the onsite visit. Helped choose the proper AI to use for the project. Looked at the pain points of Community Forklift and familiarizing the team on our short term and long term goals. I went in person to the Community Forklift, met with the logistics coordinator (Martina) and took detailed notes.

Michael- Listed deliverables required for the project. Created a rough timeline of internal due dates for our final deliverables. Added to the list of long term goals. Added to list of goals for final deliverables. Created a Gantt chart as base timeline.

Morolasaiye- Project Context

Jumar- Project Summary Abstract, task and sub tasks, went in person to community forklift warehouse and took notes.

Areeb- Contributed to scope & deliverables, short-term goals, and long-term goals. Also contributed to the risk management and mitigation plan and status report/pcl.