Organization: Greater Washington County Food Bank

Partner: Jon Schubert

Team Members: Shalini Rao, Blythe Weng, Max Dunaevschi

Project advisor: Professor Barrett

[Project community partner meeting notes](https://docs.google.com/document/d/1GxIlVwTtsn3eNmL2yw0P6RYenS8n_-kTUpjP1brqUG0/edit?usp=sharing)

Jon was unavailable to meet last week, so we were only able reschedule a meeting for the following Monday (03/22) after this sprint report is to be submitted. We’ve included the agenda below:

* Walk through task flow of scanning and data transfer that Jon sent to us via email
* Discuss more about research with other food banks and nonprofits done since our last meeting
* Nail down a prioritized list of features for the final solution to avoid scope creep
* Learn more about the location/creation of an invoice in relation to QuickBooks and new solution

[URL to the team’s project plan (updated on a weekly basis)](https://github.com/mdunaevs/GWCFB/projects/1)

Kanban board on GitHub

Here's the repository just in case: <https://github.com/mdunaevs/GWCFB>

[Possible Scanning Solutions Research](https://docs.google.com/document/d/1H1OAf9mxP_z1Dni4iOCLyego0qvRes_54YANmLG3TmE/edit?usp=sharing) (presented to Jon during weekly meeting, still a growing document)

Date: 3/22/2021

Sources:

<https://www.gwcfb.org>

<https://www.foodhelpers.org/>

<https://www.pittsburghfoodbank.org/>

Time Split Overview

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Blythe** | **Shalini** | **Max** |
| Scanning solution research | 1.5 hrs | 1.5 hrs | 1.5 hrs |
| In-depth Handifox Research | 1 hr |  |  |
| Create comprehensive feature list | 1 hr | 1 hr | 1 hr |
| Background food bank research | 2.5 hrs | 2.5 hrs | 2.5 hrs |
| Update project plan | 0.5 hrs | 0.5 hrs | 0.5 hrs |
| Create Client Meeting Agenda |  | 0.5 hrs |  |
| Kanban update |  |  | 0.5 hrs |
| Capacity Building Worksheet | 2 hrs | 2 hrs | 2 hrs |
| **Total Hours** | **8.5 hrs** | **8 hrs** | **8 hrs** |

**1. Accomplishments Since Last Sprint**

Summary:

This week our tasks were focused on continuing conducting research on pre-existing software options. Our two methods for conducting research included looking at solutions that other local food banks use (by contacting them via email and phone call) and researching pre-existing softwares (by looking online and calling customer service for top contenders).

* Scanning Solution Research
  + We conducted more in-depth research on possible solutions that could be used to help implement the scanning system that our client Jon wants implemented. Since Jon mentioned that Quickbooks Enterprise (a possible solution we presented to him last week) was far too pricey, we had to shift our focus on cheaper alternatives. However, most of the solutions we looked into seemed to be just as expensive and aimed towards for-profit companies. (Max, Shalini, Blythe, 1.5 hours each)
* In-depth HandiFox Research
  + Since Jon was very interested in HandiFox software during our last meeting, we researched more into HandiFox Software and discovered that many nonprofits are currently using the software and that they offer a lifetime license pricing option. Other options that we looked into seem to cater mostly to for profit organizations and are relatively expensive. As a result, we see HandiFox as the best current solution that we have found for the foodbank and plan to present the new information to Jon to see what he thinks and help us decide whether HandiFox could be implemented for the organization. (Blythe, 1 hour)
* Create comprehensive feature list
  + We had Jon rank the most important features he wants implemented and created a comprehensive list of features to identify when researching possible solutions. Since our client slightly changed our direction with the project, we want to finalize a list of features (ranked from high to low importance) that we will run over one more time with Jon. This will give us a priority queue to begin working with when finding a software solution. (Max, Blythe, Shalini, 1 hr each)
* Background Food Bank Research
  + We conducted background research by looking into what other food banks use for their inventory tracking system. to see what we can and cannot implement for our scanning solution. We contacted several different Food Banks (Swissvale Pantry, NCMIN, Families Forward, 412 Food Rescue, JFCS Food Bank, SFHB, SFM Food Bank) and asked them questions regarding their current system and which other resources they use to track their inventory. Unfortunately we still haven’t heard back from some of the food banks. From the ones that did reach out to us, we discovered that most other food banks used rudimentary systems like Excel sheets to keep track of their counts. They do not have scanning capabilities in their system and rely on manual counts, which is pretty similar to what GWCFB currently does. **(**2.5 hours**,** Blythe, Max, and Shalini**)**
* Update Project Plan
  + Since we were able to find out that our client Jon would prefer a pre-existing scanning solution, we updated our project plan accordingly to conduct more research on pre-existing. Furthermore, we were given advice from our TA to attempt to break down the tasks further and list one name per activity. This is important because it will help organize our individual tasks, as well as ensuring we stay focused on what the client actually wants (an existing solution) (Max, Shalini, and Blythe, 30 min)
* Create Client Meeting agenda.
  + As part of the PM role, Shalini created a client agenda which was sent to Jon the night before. This was very useful because it led to a more detailed discussion, since Jon was prepared with all the information we needed. (Shalini, 30 min)
* Update Kanban Board

**2. Blocks and Problems**

Since we have not met with Jon since our last sprint, many of the blocks and problems are still the same, although we are continuing to work on mitigating them as much as possible.

Client

* Having a lot of trouble with some of Quickbooks accounting features. Quickbooks pulls reports for each donation item and calculates it by “average price per unit” instead of just the current price per unit. This is another example of the Quickbooks software not being suited for a nonprofit organization’s needs, despite being the “nonprofit version.” Jon’s dislike for this specific feature has made him more exasperated with the software and led him to pivot our project direction a bit further away from linking our scanning system to Quickbooks.
  + We’ve been looking more at what other food banks do for their inventory tracking. We’ve contacted multiple to get more information, with minimal luck.
  + We’ve been conducting more research on making sure that our final solution is in budget and has the desired functionality.
  + We’re planning to talk to him more about a finalized priority list of features as well as clarifying where key documents such as the invoice would be produced with our new solution.
* Constantly evolving solution ideas. Jon has never had the opportunity to implement a new inventory system, so the possibility of having one now has opened his mind to several functions that would make his job easier. As a result, each small issue that comes up in his daily duties ends up being a new idea for a desired capability of the solution.
  + As advised by Professor Barrett, we need to nail down a list of features for Jon to sign off on so we do not end up with a constantly growing list.

Team

* Concerned about the scope and timing for MVP presentation. Since we have still not been told to present our proposal to Jon, we are unable to move forward with working on a proposed solution. Since the MVP presentation is due in 10 days, we are concerned about what we will be presenting for it and if we will even have something to present.
  + Talk to Professor Barret about expectations for it since our solution doesn’t really involve us building anything for it.
* We have still been getting feedback from our TA that our written assignments need some more detail and future outlook.
  + We are incorporating feedback as it comes in to make sure we are meeting all requirements.
  + There has been a focus on making sure that we write more about what’s coming in the future for our project and CP meetings.
* Rescheduling meetings for the next 3 weeks. It is very important to meet with Jon in the next upcoming weeks because we will soon be presenting our proposal to him, as well as it being the initial stages of our implementation. These weeks are crucial in ensuring that we really understand what the client wants so that we do not make the mistake of building something that is not useful to him.
  + We’ve already decided on a new meeting time with him for the next few weeks.
  + We need to have more extensive email/auxiliary meetings with him in the interim instead of pushing questions for the next weekly meeting.
* Jon wants a lot of different features implemented in the scanning system and is constantly changing his mind/adding new features.
  + We already had Jon list out the most important features that he wants implemented during our last meeting. To ensure that we are all on the same page, we plan on having a final comprehensive list (ranked most to least important) of what features this system should have and present them to Jon during our next meeting.

**3. Goals / Targets for the Next Sprint**

**Priority**

* Presenting new possible scanning solutions to client
  + In our upcoming meeting on Monday, we want to present our new findings for potential solutions to Jon. Considering that he liked the idea of having a pre-existing solution and using a mobile phone scanner (a feature that was available in both Quickbooks Enterprise and HandiFox), we prioritized our searches on that. As a result, we have been able to narrow our scope down for potential solutions and we feel that Handifox is a good option. We will, however, bring this solution up to Jon to ensure that it contains all the features he wants. (1 hour each, Max, Shalini, and Blythe)
* Continue to research existing solutions - We want to continue our research for existing solutions to help better understand what solution we will use during this project. If we come across a solution that we can implement, this will help us reduce the load on the implementation that we need to make. (Max, Shalini, and Blythe 3 hours each)
  + Blythe - Working with Handifox to learn more since it is our current frontrunner
  + Max - Looking more into other solutions
  + Shalini - Contacting other food banks to see other systems
* Look into possible hardware solutions - We want to be able to find hardware solutions for the scanning systems (phone scanner, scanning device, etc.) since this will shape how we implement our solution in the upcoming weeks (Max, Shalini, Blythe, 2 hours each)
  + Blythe - Working with Handifox to learn more since it is our current frontrunner
  + Max - Looking more into other solutions
  + Shalini - Contacting other food banks to see other systems
* Add to research document - We need to take into account the new direction Jon wants us to go in and research more software options with an expanded inventory database capability. (Max, Blythe, Shalini, 2 hrs each)

**Admin**

* Update Kanban Board - From the information we gathered from our meeting with Jon this week, we have shifted our goals to focus more on researching pre-existing software solutions. As a result, we need to update our schedule accordingly so our next steps are clear. (Max, 30 mins)
* Create client meeting agenda - This was a successful task from last week that helped focus our meeting with Jon and made it more effective and efficient. (Shalini, 30 mins)

**4. Community Partner Relationship**

We have consistent weekly meetings with Jon Schubert where we ask him questions to help us gain a better general understanding of how the technology of his organization works and what he wants implemented/changed with the system. We have a good relationship with Jon as we meet and communicate on a regular basis with him. He has also been extremely helpful with answering any clarifying questions we may have and is quick to respond to any emails. Lastly, we have established common ground with him that his available hours are from 7am-3pm on week days and make sure to schedule meetings, send emails, etc. during that period of time.

We have also started conducting more in-depth research on existing technology solutions and have a good idea of what features Jon wants in the implemented solution. In regards to this more in depth research we have looked into other non-profit Food Banks to understand the systems they use for their inventory system.

Metrics:

Meeting 7.5/10 - Jon was out of the office this Friday and will be for the next two weeks. As a result, we shifted out weekly meetings back to the Monday after and have not met with him this week yet.

Responsiveness 10/10 - Jon is fast at replying to any questions we may have between his work hours, so we make sure to get any emails to him in that timeframe. (7am-3pm)

Productivity 10/10 - We create agendas for our weekly meetings so we have a set plan of what we need to discuss

Clarity 8/10 - When talking to Jon, he adds/changes new features that he would like to be implemented every week leading to possible scope creep. To help solve this issue, we had Jon rank the features he wanted implemented from most important to least important and we will create a comprehensive list to help us gain a better understanding on what we need to prioritize. We plan to set this list in stone with Jon during our meeting with him on Monday 3/22