Oppenheimer Memorial Trust - Application Review System

Phase 1: Automated Completeness Check

Date: 4 September, 2025
Client: Oppenheimer Memorial Trust
Project Team: The Field Institute, trading as StrideShift

Executive Summary

We propose to develop an automated completeness check system for the Oppenheimer Memorial Trust's funding application review process. This Phase 1 solution will streamline the initial validation of approximately 4,000 applications by automatically verifying document completeness and format compliance, significantly reducing manual reviewer workload.

Problem Statement

The Oppenheimer Memorial Trust currently processes approximately 4,000 applications for educational funding through an entirely manual review system on the SmartSimple platform. Each reviewer handles up to 10 applications, conducting in-depth evaluations that include both technical completeness checks and qualitative assessments of applicant commitment and potential.

The current manual process requires staff of the trust and reviewers to verify:

- Document completeness (CV, academic transcripts, reference letters, etc.)
- Document format compliance and accessibility
- Basic eligibility criteria
- Valid submission requirements

This creates a significant bottleneck in the initial stages of review, where substantial reviewer time is spent on administrative validation tasks before meaningful evaluation can begin.

Proposed Solution

Phase 1 Scope: Automated Completeness Check

We will develop a system that automatically validates whether applications meet basic submission requirements before human review. This system will serve as an initial filter to

identify incomplete submissions, inaccessible documents, and formatting issues—freeing reviewers to focus their expertise on substantive evaluation of qualified candidates.

Technical Approach

1. **Primary Method - API Integration:** Direct integration with SmartSimple platform using API access
2. **Alternative Methods Available:**
    - SmartSimple vendor coordination if direct API requires additional support
    - Excel/CSV export processing with formatted return data
    - Playwright automation for browser-based interaction if API access is limited
3. **Document Processing:** Automated validation against predefined criteria
4. **System Updates:** Automatic status updates within existing SmartSimple workflow
5. **Batch Processing:** Concurrent processing capability for efficient throughput

Work Breakdown Structure

Client Requirements (Your Team)

- **API Access Setup**: Provide API key for SmartSimple platform with appropriate expiration period
- **Test Environment Creation**: Set up dummy project with representative application data (excluding real PII)
- **System Access**: Provide read-only login credentials for validation testing
- **Consultation Availability**: Technical discussions, privacy requirements clarification, and project coordination

Development Work (Our Team)

- **Technical Integration & Testing**: API connection setup and initial system interaction tests
- **Privacy & Compliance Framework**: GDPR compliance protocols and PII sanitization procedures
- **Document Validation Development**: Core completeness checking logic and criteria implementation
- **Quality Assurance & Edge Case Testing**: Comprehensive testing across document types and scenarios

Project Coordination

- **Requirements Clarification**: Privacy protocols and decision threshold discussions
- **Implementation Planning**: Deployment method and scheduling coordination
- **Progress Reviews**: Status updates and technical validation

Technical Implementation Options

Primary Approach: Direct API integration with Smart Simple platform

- **Backup Option 1:** Smart Simple vendor coordination if direct API access unavailable
- **Backup Option 2:** Excel/CSV export processing with manual upload
- **Backup Option 3:** Playwright automation for browser-based interaction

Note on API Verification: While SmartSimple's documentation confirms full API support for the proposed integration, direct verification with their account management team is still pending due to the temporary unavailability of the relevant personnel. Should any unforeseen API limitations arise, we are prepared to implement the alternative technical approaches outlined above (Excel/CSV export processing or Playwright automation) to ensure successful delivery.

Timeline

- **Setup Phase:** 1 week (API access and environment preparation)
- **Development Phase:** 1-2 weeks (based on team availability)
- **Testing Phase:** 3-5 days (concurrent with development)
- **Total Duration:** 3 weeks

Processing Capability: Once deployed, the system can process all 4,000 applications in approximately 40 minutes using batch processing (20-30 applications per batch) during scheduled maintenance windows to minimize system impact.

Value Proposition

This automated completeness check will:

- **Reduce Manual Workload:** Eliminate routine administrative validation tasks from reviewer responsibilities
- **Improve Efficiency:** Allow reviewers to focus expertise on substantive evaluation rather than basic compliance checking
- **Enhance Quality:** Ensure consistent application of completeness criteria across all submissions
- **Accelerate Processing:** Enable faster initial screening and routing of applications
- **Scale Operations:** Handle increased application volumes without proportional reviewer expansion

Open Questions Requiring Clarification

Critical Dependencies for Project Success:

1. **Privacy & Data Handling Requirements**
    - What specific PII and proprietary information protocols must be observed?

    - Are there restrictions on data processing locations or third-party tools?
    - Would you prefer a dummy database approach or read-only permissions with external processing?
2. **Decision Criteria & Thresholds**
    - How should borderline cases (applications that are 80-90% complete) be handled?
    - What are your tie-breaking protocols for edge cases requiring discretion?
    - Should the system err on the side of inclusion or exclusion?
3. **System Integration & Control**
    - How do you prefer to initiate automated checking processes? (manual trigger, scheduled runs, date-based flags)
    - What is your preferred deployment schedule to minimize system impact?
    - Do you require a separate user interface or integration within the existing SmartSimple workflow?
4. **Project Timeline & Delivery**
    - What is your target completion date for Phase 1?
    - Are there specific deadlines or application review cycles we should coordinate with?
5. **Technical Platform Details**
    - Can SmartSimple API support concurrent processing loads?
    - What are the optimal processing batch sizes for your system?
    - Are there maintenance windows we should schedule around?

Next Steps

1. **Immediate:** Client provides API access and sets up test environment
2. **Week 1:** Technical setup and integration testing
3. **Week 2-3:** Development, testing, and deployment
4. **Ongoing:** System monitoring and support

Investment Summary

Phase 1 Build (once-off): R80 000 (excl. VAT)

Optional Ongoing Licence, Hosting & Maintenance: R20 000 per month (excl. VAT). This monthly fee applies only if OMT elects to licence and operate the system beyond the Phase 1 build.

Expected ROI: Significant reduction in manual review time, enabling faster application processing and reduced administrative burden.

Note: This proposal covers Phase 1 only. Phase 2 (advanced AI-assisted review recommendations) would be a separate project requiring additional discovery and trust-building phases.

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