CASE STUDY | PROJECT DELIVERY • SYSTEMS • TECHNICAL OPERATIONS | FEB–DEC 2024

S.H.E. COLLEGE FUND

Building the operating system behind a scholarship programme.

Digital Consultant | CRM design • Project leadership • Data systems • Fundraising operations • Brand strategy

THE ORGANISATION

The S.H.E. College Fund supports young Kenyan women who have escaped harmful practices such as FGM/C and early forced marriage, providing college scholarships, mentorship, life-skills support and career development. The operating model spans a US-based leadership and fundraising function and a Kenya-based delivery team.

I joined as a freelance Digital Consultant with a broad brief around digital systems and sponsor growth. The project quickly became much more operational: the organisation needed a usable CRM, cleaner data, a better sponsor journey, clearer reporting, stronger fundraising infrastructure and a team in Kenya that could confidently run the system after handover.

SCALE

The system in numbers

1,421 donor records	**56** primary funders	**142** student records	**5** Kenya team members led
2 country teams connected	**2** linked CRM environments	**7** student lifecycle statuses	**4** funding types governed

01 DISCOVERY

The problem: the organisation had data, but not a system

Before the project, the US and Kenya teams were working from separate spreadsheets. The Kenya team maintained operational student information, while parts of that data flowed into the US file. There was no structured CRM, no shared data model and no consistent set of rules governing how funders, contracts, students and donor records related to one another.

The obvious answer would have been to move the organisation onto an off-the-shelf CRM. In practice, that would have created a different problem. Both teams were comfortable with Google Sheets and found third-party CRM platforms difficult to navigate. A technically elegant system that the users avoided would have solved nothing.

So the project constraint became part of the design brief: build something robust enough to behave like a CRM, but familiar enough that the team would actually use it.

DESIGN CONSTRAINT

The system had to improve structure without increasing the cognitive load on a non-technical team. Familiar interface, stricter backend.

02 REQUIREMENTS & PROCESS MAPPING

From brief to requirements

I took the strategic brief from the Executive Director and Founder, then translated it into operational requirements with the Kenya team. Weekly calls helped surface how student records were actually maintained, where duplication or missing information occurred, what sponsors needed to see, and which reporting tasks were consuming unnecessary time.

I mapped the core workflows around sponsor onboarding, funding agreements, student assignment, student status changes, reporting, donor communications and payments. From there, I defined what the system needed to know, which team owned each input, and what rules were required to keep the information consistent.

DISCOVER Stakeholder interviews, current-state review, pain points and user constraints	**MAP** Sponsor, contract, student, donor and reporting workflows	**DEFINE** Data entities, fields, business rules, ownership and validation logic
BUILD Sheets-based CRM, automations, dashboards and integrations	**TEST** Record matching, workflow checks, user testing and issue resolution	**ENABLE** Training, SOPs, role clarity and handover to the Kenya team

03 SYSTEM DESIGN

Designing the CRM architecture

The CRM was structured around distinct but linked entities rather than one large spreadsheet. That distinction was important because a donor, a sponsor, a contract and a student are not interchangeable records. Each has its own lifecycle, reporting needs and ownership.

Primary Funders

Lead and co-sponsors, contact details, status, funding type and active period.

Funders

Foundations, family offices and philanthropists supporting cohorts or enrichment programmes.

Donors

Broader one-off and recurring donor records.

Student Records

Operational academic and support information linked back to the student.

PF Contracts

Funding amount, duration, renewal conditions, status and student-linked requirements.

Funder Contracts

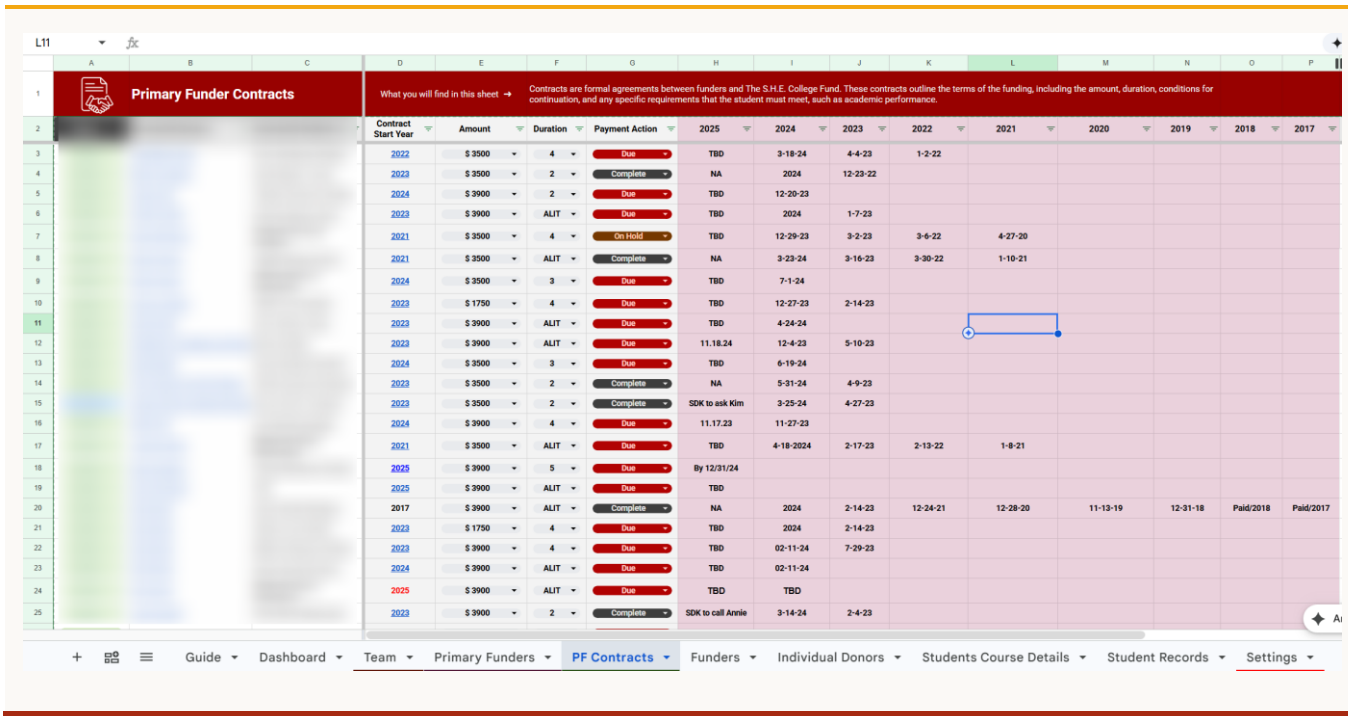
Restricted/unrestricted grant terms and programme-level commitments.

Students

Funding relationship and current lifecycle state.

Dashboard

Leadership view across students, funders, donations and programme outcomes.



Primary Funder Contracts

What you will find in this sheet → Contracts are formal agreements between funders and The S.H.E. College Fund. These contracts outline the terms of the funding, including the amount, duration, conditions for continuation, and any specific requirements that the student must meet, such as academic performance.

Contract Start Year	Amount	Duration	Payment Action	2025	2024	2023	2022	2021	2020	2019	2018	2017
2022	$ 3500	4	Due	TBD	3-18-24	4-4-23	1-2-22					
2023	$ 3500	2	Complete	NA	2024	12-23-22						
2024	$ 3900	2	Due	TBD	12-20-23							
2023	$ 3900	ALIT	Due	TBD	2024	1-7-23						
2021	$ 3500	4	On Hold	TBD	12-29-23	3-2-23	3-6-22	4-27-20				
2021	$ 3500	ALIT	Complete	NA	3-23-24	3-16-23	3-30-22	1-10-21				
2024	$ 3500	3	Due	TBD	7-1-24							
2023	$ 1750	4	Due	TBD	12-27-23	2-14-23						
2023	$ 3900	ALIT	Due	TBD	4-24-24							
2023	$ 3900	ALIT	Due	11.18.24	12-4-23	5-10-23						
2024	$ 3500	3	Due	TBD	6-19-24							
2023	$ 3500	2	Complete	NA	5-31-24	4-9-23						
2023	$ 3500	2	Complete	SDK to ask Kim	3-25-24	4-27-23						
2024	$ 3900	4	Due	11.17.23	11-27-23							
2021	$ 3500	ALIT	Due	TBD	4-18-2024	2-17-23	2-13-22	1-8-21				
2025	$ 3900	5	Due	By 12/31/24								
2025	$ 3900	ALIT	Due	TBD								
2017	$ 3900	ALIT	Complete	NA	2024	2-14-23	12-24-21	12-28-20	11-13-19	12-31-18	Paid/2018	Paid/2017
2023	$ 1750	4	Due	TBD	2024	2-14-23						
2023	$ 3900	4	Due	TBD	02-11-24	7-29-23						
2024	$ 3900	ALIT	Due	TBD	02-11-24							
2025	$ 3900	ALIT	Due	TBD	TBD							
2023	$ 3900	2	Complete	SDK to call Annie	3-14-24	2-4-23						

Guide • Dashboard • Team • Primary Funders • PF Contracts • Funders • Individual Donors • Students Course Details • Student Records • Settings

04 BUSINESS RULES

Governance was built into the data model

I created controlled taxonomies so the system could be used by multiple people without slowly producing several versions of the same status. The protected Settings layer became the source of truth for these rules.

Primary Funder Status	Current • Past • Deceased • Never Contact
Contract Status	Current • Complete • Void
Funding Type	Annual • Restricted Grant • Unrestricted Grant • Kim Rosen Scholarship Fund
Student Status	Current • Graduate • Withdrawn • Expelled • On-Hold • On-Leave • Pending Graduate

I also locked the Settings area and wrote an in-system guide explaining how each tab worked, what the terminology meant and when users should escalate questions. The governance layer was part of the product, not documentation added after the build.

05 CODING, AUTOMATION & INTEGRATION

The technical build

Building the system pushed me further into the technical side of delivery. I completed a basic Python certification during the engagement and used Python where it made the system more reliable: cleaning legacy data, matching sponsor and student records, automating updates, generating dashboard inputs and working with APIs.

The challenge was not writing sophisticated software for its own sake. It was knowing where code could remove repetitive work or reduce error, then translating that into a system the team could still understand and maintain.

Data cleaning — Standardised legacy records and removed inconsistent values before migration.

Record matching — Linked sponsor, contract and student information across previously separate records.

Automation — Reduced repetitive updates between the Kenya and US operating views.

Dashboard generation — Prepared structured data for leadership-level monitoring and reporting.

API interaction — Connected system components where third-party services needed to pass or receive data.

06 FUNDRAISING OPERATIONS

Rebuilding the sponsor journey

The CRM was only one part of the problem. Sponsor acquisition and payment also needed to become easier. I worked across Givebutter and Squarespace forms to improve the path from sponsor interest to completed payment, including recurring giving, website forms, routing, campaign setup and the data captured behind each interaction.

I also built the broader sponsor strategy around donor segmentation, recurring-giving propositions, campaign concepts, outreach journeys, collateral, automated communications, website changes and social-media activity.

FROM CAMPAIGN TO BACKEND

The front-end message and the backend process had to agree. A strong sponsorship proposition is wasted if the payment path is confusing, the data does not land cleanly, or the team cannot tell who needs follow-up.

07 TEAM & STAKEHOLDER MANAGEMENT

Leading delivery across two countries

The project sat between US-based leadership and a five-person Kenya team. I took strategic direction from the Executive Director and Founder, then worked with the Kenya team to turn those priorities into operational tasks and usable processes.

I ran weekly calls, assigned and reviewed data-cleaning work, trained the team on the CRM, tested workflows with them and created SOPs for recurring activities. Because the team was not highly technical, training was designed around real tasks rather than system theory: what to update, when to update it, what not to change, and what to do when a record did not fit the normal path.

That cadence also gave me an early-warning view of adoption issues. If a field was consistently misunderstood or a process required too many explanations, I treated that as a design problem before treating it as a user problem.

08 COMMUNICATIONS INFRASTRUCTURE

A second system: the brand

Alongside the CRM and sponsor operations, I built a complete S.H.E. brand guide covering the organisation's visual and communications system. The purpose was similar to the CRM in one important respect: reduce reliance on individual memory and make consistency easier as more people contribute to the work.

The guide created a common structure for donor materials, newsletters, web content, campaigns and reporting, while leaving enough room for the stories of the students and the Kenya team to remain human.

09 RESULTS

Operational outcomes

The system gave the organisation one governed structure for data that had previously been split across separate team files, while keeping the interface inside Google Sheets so the users did not have to learn an unfamiliar enterprise CRM.

The hard scale at handover was 1,421 donor records, 56 primary funders and 142 student records. For the operational improvements below, I have used working estimates based on the process redesign and automation described above. They should be replaced with verified figures or a defensible range before publication.

~70%* faster recurring leadership reporting	**~60%*** less manual reconciliation between team records	**~80%*** reduction in duplicate / inconsistent status handling
~50%* faster sponsor onboarding and record setup	**~30%*** improvement in recurring-giving completion / follow-up efficiency	**100%** Kenya delivery team trained on the new system

10 GROWTH THROUGH DELIVERY

The project I did not know I was signing up for

I took the engagement because I was interested in the organisation and the digital challenge. I finished it having built a CRM, written automation, worked with APIs, redesigned a sponsor-payment journey, led a distributed team and documented an operating system that other people could run.

That is one of the reasons I value projects outside my existing comfort zone. I do not need to become the engineer in the room, but I want enough technical fluency to ask sensible questions, understand constraints, challenge assumptions and work productively with the people who are building the solution.

For S.H.E., learning the technical layer was not separate from the project-management work. It was what allowed me to manage the project properly.