

# Project Charter & Scope of work

## **Integrated Membership Management**



Apple and Pear Australia Limited (APAL)

39 O'Connell St  
North Melbourne, VIC, 3051

03 October 2014

Sophie Clayton



# Table of Contents

## Executive summary

- Key Objectives

- Return on Investment

- Project Scope

- Costs & Budget

- Timeline & milestones

## Project objectives and benefits

- Introduction

- Our mission

- Projects contribution to our mission

- Our organisational goals

- Projects contribution to our organisational goals

## Return on investment

## Roles, Responsibilities and Effort

## Process and timelines

- Timeline & milestones

## Supplier evaluation criteria

## Scope: Features and functions

- Functional areas: ROI & Benefits

- ROI & Benefits by feature

# 1. Executive summary

## The projects contribution to our organisations mission

- better member management will help us communicate more effectively with apple and pear growers to support the industry better

## The projects contribution to our organisations current goals

- streamline our member and contact management
- improve communication with members
- integrate different software platforms

## Return on Investment

During the process of project scoping we have estimated the target yearly return on investment (ROI). For each feature and function we have estimated the time and cost savings.

The total ROI assumes a successful project, it is: **\$ 0**

## Project Scope

The full project scope contains functional areas and features within each of these functional areas. Each of the features can present operational improvements (captured in ROI), or benefits to stakeholders. A breakdown of these [features and functions is provided below](#) , this table provides a summary.

Number of functional areas	8
Number of features to be implemented	93
Number of expected stakeholder benefits or improvements	6
Number of cost saving features	0
Estimated yearly cost savings (ROI)	\$ 0

## Costs & Budget

We are going to market to finalise pricing, however we are suggesting allocating a provisional project budget of **20,000**.

The project will also require the involvement of the following team members:

Sophie Clayton  
Leanne Groves  
Nikita Block

## Timeline & milestones

The project duration is expected to be **71** days.

- The intended start date is: **28 August 2014**
- The target completion date is: **07 November 2014**

## 2. Project objectives and benefits

### Introduction

This section presents the motivations for the project. These include project our objectives, how these fit with our organisational strategy and other benefits.

### Our mission

Apple and Pear Australia Limited (APAL) is the peak industry body representing commercial apple and pear growers in Australia. APAL is charged with providing leadership, support and additional resources to drive key industry initiatives, which meet the goals of the industry strategic plan.

### Our goals

Includes: - increase membership - communicate more effectively with apple and pear growers - improve industry participation - increase organisational efficiency - provide better services to members, stakeholders, and apple and pear growers - organise our data management and systems for members, contacts, newsletters, web logins, SMS, etc - capture organisational data and share it better across the organisation

### The projects contribution to our organisations mission

- better member management will help us communicate more effectively with apple and pear growers to support the industry better

### The projects contribution to our organisations current goals

- streamline our member and contact management - improve communication with members  
- integrate different software platforms

### 3. Return on investment

This section presents the estimated return on investment (ROI) that can be achieved from a successful project implementation.

The section totals the ROI by the functional area, supporting details of [ROI at the feature level is provided below](#).

Functional area	Features in area	Total yearly savings (ROI)
Contact Database	6	\$ 0
Membership management	2	\$ 0
Member Services/benefits	4	\$ 0
Marketing Communications	6	\$ 0
Events Registration	4	\$ 0
Event Administration	6	\$ 0
Order Management	1	\$ 0
Website Content Management	4	\$ 0

## 4. Roles, Responsibilities and Effort

Successful execution of the project will require the input and participation of a number of team members, these are listed below along with the anticipated level of effort and their roles and responsibilities.

Team member	Responsibility / contribution	Estimate effort
Sophie Clayton	Project manager	8
Leanne Groves	Strategic adviser - member knowledge	5
Nikita Block	Strategic adviser - current systems and data	5

## 5. Process and timelines

We are expecting the project to be delivered during the following period; the project is broken into key milestones shown below.

### Timeline & milestones

The project duration is expected to be **71** days.

- The intended start date is: **28 August 2014**
- The target completion date is: **07 November 2014**

The project will include key milestones, these will help us monitor and keep the project on time and budget. The milestones are not finalised, but are likely to include:

Milestone No.	Milestone name	Date
1	Project Commencement	28 August 2014
2	Supplier engaged	10 September 2014
3	Scoping and planning complete	17 September 2014
4	Interface design complete	01 October 2014
5	Development complete	29 October 2014
6	User testing complete	08 October 2014
7	Training complete and system live	31 October 2014
8	Project Completion	07 November 2014

## 6. Supplier evaluation criteria

We will be selecting a supplier based on the following criteria in the priority order shown.

Evaluation criteria	Weight
Match to functional requirements	40
Value for money	20
Organisational fit	5
Team (technical & relationship)	5
Strength of project process	5
References (track record)	5
Referees (your current clients)	5
Locations and logistics	5
Warrantees (products & services)	5
Company history and stability	5

These criteria will be published to all suppliers intending to be involved in the RFQ process.



## 7. Scope: Features and functions

### Functional areas : Priority score, ROI & Benefits

Each of the functional areas may provide a return on investment (through operational efficiency), and/or a benefits (e.g. a service improvement) to stakeholders. These are presented here by functional area; supporting detail at the [feature level is provided below](#).

Contact Database	
<b>Description</b> In almost all membership system builds, whether on or off line, the contact database is a central feature. It is mandatory to the implementation of a working membership system.  Your contact database records information on all of your constituency, independent of their relationship to your organisation. These attributes (for example, subscriber, current member, committee member) all refer back to the central contact database.  A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.  Contact database features include: <ul style="list-style-type: none"><li>- Adding new contact details</li><li>- Managing and editing contacts and status</li><li>- Manage access and user permissions</li></ul>	<b>Number of features</b> 6 <b>ROI</b> \$0/YR <b>Priority</b> 5 mandatory, 1 important, 0 nice to have, <b>Benefit to:</b> APAL staffAPAL staffAPAL staffAPAL staff Levy payers apple and pear APAL members APAL Board HAL PartnersAPAL staffAPAL staff APAL members APAL Board Levy payers apple and pear Partners HAL
<b>Notes:</b>	

Membership management	
<b>Description</b> Members are the lifeblood of the organisation, delivering services to them	<b>Number of features</b> 2 <b>ROI</b>

<p>and enhancing their lives is a key priority. Membership Management is therefore an essential function for Associations and many other other non-profits groups.</p> <p>The level of functionality required to support the management of your membership data and membership interactions will vary with the complexity of your membership structures and the overall level of automation and interaction you require.</p> <p>Closely tracking and growing membership numbers is often a primary goal and key revenue generator, so storing and (quickly and flexibly) accessing information on them is essential.</p> <p>Key Membership Management features include:</p> <ul style="list-style-type: none"> <li>- Membership cycles can be defined (calendar year, pro-rater etc)</li> <li>- Membership levels and pricing can be configured</li> <li>- Membership reporting tools</li> </ul>	<p>\$0/YR</p> <p><b>Priority</b> 0 mandatory, 2 important, 0 nice to have,</p> <p><b>Benefit to:</b> APAL staff APAL BoardAPAL staff APAL Board</p>
<p><b>Notes:</b></p>	

Member Services/benefits	
<p><b>Description</b></p> <p>Providing the ability for members to self serve, can represent significant savings to your organisation as well as an improved service. It can also encourage quicker renewals and processing and an increased number of renewals and new members.</p> <p>Being able to cost effectively provide members with additional online services and membership benefits and being able to provide different levels of services to different membership levels can increase</p>	<p><b>Number of features</b> 4</p> <p><b>ROI</b> \$0/YR</p> <p><b>Priority</b> 2 mandatory, 2 important, 0 nice to have,</p> <p><b>Benefit to:</b> APAL staff APAL membersAPAL members APAL staffAPAL staff APAL members Levy payers apple and pearAPAL staff APAL members Levy payers apple and pear</p>

the attractiveness of your offerings, enable you to upsell your memberships and encourage members to continue to maintain their membership.

Key features include:

- Members can update there own details at any time
- Different levels of memberships can have access to different information/services
- Non-members (contacts or lapsed members) can also update details

**Notes:**

## Marketing Communications

### Description

Moving your communications from the traditional posting of letters also represents significant savings and flexibility. Many organisations are in-fact being pushed by there members and constituents to stop sending letters, in preference to email.

Whilst for many the transition from letters to email can take some time, even moving 50% of your communications will save money and benefit the environment. A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.

Key features include:

- Newsletters (as well as notifications to individuals) can be sent from the system
- Subsets of database can be chosen based on a range of profile information and/or custom segments
- Statistics are available to allow analysis of success of communication

### Number of features

6

### ROI

\$0/YR

### Priority

3 mandatory, 3 important, 0 nice to have,

### Benefit to:

APAL staff

APAL membersLevy payers apple and pear

APAL members

APAL staff

APAL BoardAPAL staff

Levy payers apple and pear

APAL members

HAL

PartnersAPAL staffAPAL staff

APAL members

HAL

Partners

Levy payers apple and pear

APAL BoardAPAL staff

**Notes:**

--

Events Registration	
<p><b>Description</b></p> <p>The management of events is a common activity and therefore requirement for Associations and non-profit systems. Its automation often represents dramatic savings because of the high level of manual processing required for each ticket and attendee for every event.</p> <p>A list of functional line items relating to Event Registration are provided below for you to include or exclude and to provide a ranking of importance for your project.</p> <p>Key features include:</p> <ul style="list-style-type: none"> <li>- Events can be quickly and easily published onto the website</li> <li>- Members receive different event pricing to non-members</li> <li>- Registrants can purchase tickets to all events in a suite of events or purchase in groups</li> </ul>	<p><b>Number of features</b></p> <p>4</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Priority</b></p> <p>0 mandatory, 3 important, 1 nice to have,</p> <p><b>Benefit to:</b></p> <p>APAL staff APAL members HAL Partners Levy payers apple and pear APAL Board APAL members HAL Partners Levy payers apple and pear APAL Board APAL staff APAL members APAL members APAL staff</p>
<p><b>Notes:</b></p>	

Event Administration	
<p><b>Description</b></p> <p>The 'back-office' activities required when running an event can be extensive and time consuming. Many however can be automated to some extent, which represents a significant saving of time and money.</p> <p>Key features include:</p> <ul style="list-style-type: none"> <li>- Seating allocation can be done automatically but with manual override as required</li> </ul>	<p><b>Number of features</b></p> <p>6</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Priority</b></p> <p>0 mandatory, 0 important, 6 nice to have,</p> <p><b>Benefit to:</b></p> <p>APAL staff APAL members HAL Partners Levy payers apple and pear</p>

<ul style="list-style-type: none"> <li>- Name tags can be automatically generated for event</li> <li>- Follow up emails can be sent to both attendees and non-attendees after event</li> </ul>	APAL Board APAL staff APAL staff APAL staff APAL members Levy payers apple and pear Partners HAL APAL Board APAL staff APAL members HAL Partners Levy payers apple and pear APAL Board APAL staff
<b>Notes:</b>	

Order Management	
<p><b>Description</b></p> <p>If you require to take online payments you will need also to manage the related orders. These orders might be membership payments, events bookings or product purchases. Each will require actioning and reconciliation. This is therefore an essential feature if payments are to be processed.</p> <p>A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.</p> <p>Key features include:</p> <ul style="list-style-type: none"> <li>- A range of online payment gateways are supported</li> <li>- Orders can be processed through a number of different statuses reflecting your processes</li> <li>- Integration with common accounting packages is available</li> </ul>	<p><b>Number of features</b></p> <p>1</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Priority</b></p> <p>0 mandatory, 0 important, 1 nice to have,</p> <p><b>Benefit to:</b></p> <p>APAL staff  APAL members</p>
<b>Notes:</b>	

Website Content Management	
<p><b>Description</b></p> <p>Websites are a critical channel of communication for Associations. To keep a website up to date, fresh, relevant and attractive to search engines the content on the site should be modified and updated regularly. It is therefore essential that this task can be easily and quickly managed by non-technical personnel.</p> <p>A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.</p> <p>Key features include:</p> <ul style="list-style-type: none"> <li>- All site content can be managed by non-technical administrators</li> <li>- Menu structures and Information Architectures (site maps) can managed</li> <li>- Content approval workflow is supported</li> </ul>	<p><b>Number of features</b></p> <p>4</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Priority</b></p> <p>3 mandatory, 0 important, 1 nice to have,</p> <p><b>Benefit to:</b></p> <p>APAL staffAPAL staffAPAL staffAPAL members HAL Partners Levy payers apple and pear APAL Board APAL staff</p>
<p><b>Notes:</b></p>	

## ROI & Benefits by feature

Each functional area is made up of a number of common and related features, each has been rated by importance and has an associated ROI estimate. Below is provided the feature list grouped into their functional areas.

## Contact Database

Contact Database can include both member and non-member details	
<p><b>Notes:</b></p>	<p><b>Priority</b></p> <p>Mandatory</p> <p><b>ROI</b></p>

	<p>\$0/YR</p> <p><b>Benefit to:</b></p> <p>APAL staff</p>
--	---

The data that needs to be stored for each contact can be configured	
<p><b>Notes:</b></p> <p>We require the ability to add custom fields for contacts/members.</p>	<p><b>Priority</b></p> <p>Mandatory</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Benefit to:</b></p> <p>APAL staff</p>

The Contact Database provides multiple levels of hierarchy e.g. Organisation, Division, Contact	
<p><b>Notes:</b></p>	<p><b>Priority</b></p> <p>Mandatory</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Benefit to:</b></p> <p>APAL staff</p>

The Contact Database can be searched, filtered and segmented in a number of different ways	
--	--

<b>Notes:</b>	<b>Priority</b> Mandatory  <b>ROI</b>  \$0/YR  <b>Benefit to:</b>  APAL staff Levy payers apple and pear APAL members APAL Board HAL Partners
---------------	---

Via the Contact Database a person's complete relationship with the organisation can be viewed e.g. membership(s), event registrations, online store purchases, email communications

<b>Notes:</b>	<b>Priority</b> Mandatory  <b>ROI</b>  \$0/YR  <b>Benefit to:</b>  APAL staff
---------------	--

Subsets of the Contact Database can be exported for use externally

<b>Notes:</b>	<b>Priority</b> Mandatory  <b>ROI</b>
---------------	--



	<p>\$0/YR</p> <p><b>Benefit to:</b></p> <p>APAL staff  APAL members  APAL Board  Levy payers apple and pear  Partners  HAL</p>
--	--

### Membership management

Memberships can be processed through a number of different statuses reflecting the organisation's administration processes	
<p><b>Notes:</b></p>	<p><b>Priority</b></p> <p>Important</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Benefit to:</b></p> <p>APAL staff  APAL Board</p>

A range of membership related reports are available	
<p><b>Notes:</b></p> <p>We require membership reports showing number of members, eg by state and what they grow.</p>	<p><b>Priority</b></p> <p>Important</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Benefit to:</b></p> <p>APAL staff</p>

	APAL Board
--	------------

### Member Services/benefits

Members can update there own details at any time	
<b>Notes:</b>	<b>Priority</b> Mandatory <b>ROI</b> \$0/YR <b>Benefit to:</b> APAL staff APAL members

The details that members can update can be configured to be a subset of total contact database information	
<b>Notes:</b>	<b>Priority</b> Mandatory <b>ROI</b> \$0/YR <b>Benefit to:</b> APAL members APAL staff

Non-members (contacts or lapsed members) can also update details	
<b>Notes:</b>	<b>Priority</b>

	<p>Mandatory</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Benefit to:</b></p> <p>APAL staff APAL members Levy payers apple and pear</p>
--	--

Different levels of memberships can have access to different information/services	
<p><b>Notes:</b></p> <p>Ideally we want an integrated service where members and contacts can subscribe to specific services (eg. newsletters, magazine) on the one platform.</p>	<p><b>Priority</b></p> <p>Mandatory</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Benefit to:</b></p> <p>APAL staff APAL members Levy payers apple and pear</p>

### Marketing Communications

Different subsets of members can be targeted based on membership type	
<p><b>Notes:</b></p>	<p><b>Priority</b></p> <p>Important</p> <p><b>ROI</b></p> <p>\$0/YR</p>

	<b>Benefit to:</b>  APAL staff APAL members
--	--

Both members can non-members can be targeted	
<b>Notes:</b>	<b>Priority</b>  Mandatory  <b>ROI</b>  \$0/YR  <b>Benefit to:</b>  Levy payers apple and pear APAL members APAL staff APAL Board

Subsets of database can be chosen based on a range of profile information and/or custom segments	
<b>Notes:</b>	<b>Priority</b>  Mandatory  <b>ROI</b>  \$0/YR  <b>Benefit to:</b>  APAL staff Levy payers apple and pear APAL members HAL Partners

--	--

Different communications require differently styled email templates	
<b>Notes:</b>	<b>Priority</b> Mandatory <b>ROI</b> \$0/YR <b>Benefit to:</b> APAL staff

Statistics are available to allow analysis of success of communication	
<b>Notes:</b> Needs to be comparable in capacity to system like MailChimp.	<b>Priority</b> Mandatory <b>ROI</b> \$0/YR <b>Benefit to:</b> APAL staff APAL members HAL Partners Levy payers apple and pear APAL Board

Newsletters (as well as notifications to individuals) can be sent from the system	
<b>Notes:</b> Would be nice to have this embedded in	<b>Priority</b>

<p>tool OR have capacity to synchronise with them (MailChimp).</p>	<p>Mandatory</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Benefit to:</b></p> <p>APAL staff</p>
--	--

### Events Registration

<p>Events can be quickly and easily published onto the website</p>	
<p><b>Notes:</b></p>	<p><b>Priority</b></p> <p>Important</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Benefit to:</b></p> <p>APAL staff</p> <p>APAL members</p> <p>HAL</p> <p>Partners</p> <p>Levy payers apple and pear</p> <p>APAL Board</p>

<p>Events can be browsed via any number of categories and subcategories e.g. by location, by type of event</p>	
<p><b>Notes:</b></p>	<p><b>Priority</b></p> <p>Important</p> <p><b>ROI</b></p> <p>\$0/YR</p>

	<b>Benefit to:</b> APAL members HAL Partners Levy payers apple and pear APAL Board APAL staff
--	---

Members receive different event pricing to non-members	
<b>Notes:</b>	<b>Priority</b> Important  <b>ROI</b> \$0/YR  <b>Benefit to:</b> APAL members

Events can have early bird pricing	
<b>Notes:</b>	<b>Priority</b> Important  <b>ROI</b> \$0/YR  <b>Benefit to:</b> APAL members APAL staff

## Event Administration

The details to be captured for an event can be configured and presented to the end user in a consistent layout

**Notes:****Priority**

Nice to have

**ROI**

\$0/YR

**Benefit to:**

APAL staff

APAL members

HAL

Partners

Levy payers apple and pear

APAL Board

Certain types of events can only be attended by members or by certain types of members

**Notes:****Priority**

Nice to have

**ROI**

\$0/YR

**Benefit to:**

APAL staff

Name tags can be automatically generated for event

**Notes:****Priority**



	<p>Nice to have</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Benefit to:</b></p> <p>APAL staff</p>
--	---

Reminder emails can be sent to registrants prior to event	
<p><b>Notes:</b></p>	<p><b>Priority</b></p> <p>Nice to have</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Benefit to:</b></p> <p>APAL staff</p> <p>APAL members</p> <p>Levy payers apple and pear</p> <p>Partners</p> <p>HAL</p> <p>APAL Board</p>

Followup emails can be sent to both attendees and non-attendees after event	
<p><b>Notes:</b></p>	<p><b>Priority</b></p> <p>Nice to have</p> <p><b>ROI</b></p> <p>\$0/YR</p> <p><b>Benefit to:</b></p> <p>APAL staff</p>

	APAL members HAL Partners Levy payers apple and pear APAL Board
--	---

Person's attendance at an event can be recorded	
<b>Notes:</b>	<b>Priority</b> Nice to have  <b>ROI</b> \$0/YR  <b>Benefit to:</b> APAL staff

### Order Management

A range of payment methods can be offered	
<b>Notes:</b>	<b>Priority</b> Nice to have  <b>ROI</b> \$0/YR  <b>Benefit to:</b> APAL staff APAL members

### Website Content Management

All site content can be managed by non-technical administrators

**Notes:**

**Priority**

Mandatory

**ROI**

\$0/YR

**Benefit to:**

APAL staff

Menu structures and Information Architectures (site maps) can managed

**Notes:**

**Priority**

Mandatory

**ROI**

\$0/YR

**Benefit to:**

APAL staff

Version control and archiving of content is available

**Notes:**

**Priority**

Mandatory

**ROI**

\$0/YR

**Benefit to:**

APAL staff

--	--

Generated site content is search engine friendly	
<b>Notes:</b>	<b>Priority</b> Mandatory <b>ROI</b> \$0/YR <b>Benefit to:</b> APAL members HAL Partners Levy payers apple and pear APAL Board APAL staff