

Project Introduction & Rationale

Integrated Membership Management



Apple and Pear Australia Limited (APAL)

39 O'Connell St

North Melbourne, VIC, 3051

30 January 2015

Sophie Clayton

1. About this document

This document provides an introduction to, and summary of, the **Integrated Membership Management** project that we believe will provide significant operational, service and financial benefits to **Apple and Pear Australia Limited (APAL)** and its stakeholders.

It is provided to:

1. Inform stakeholders about our proposed project, resulting systems and key benefits; and
2. To assess and attain the, financial commitment, enthusiasm and endorsement to progress it further.

TABLE OF CONTENTS

Executive summary

Key Objectives

Operational savings / Return on Investment

Non-financial benefits

Project Scope

Functional areas to be implemented

Costs and timelines

Timeline & milestones

Roles and responsibilities

Conclusion and Next steps [Project objectives and benefits](#)

This document provides an introduction to, and summary of, the **Integrated Membership Management** project that we believe will provide significant operational, service and financial benefits to **Apple and Pear Australia Limited (APAL)** and its stakeholders.

Assuming that the project progresses we anticipate that it will be completed by **07 November 2014**, at an expect cost of **20,000**.

[Contribution to Apple and Pear Australia Limited \(APAL\) mission](#)

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

[Contribution to Apple and Pear Australia Limited \(APAL\) goals](#)

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

[Operational savings / Return on Investment](#)

This project is intended to generate ongoing savings/returns against the initial financial investment. Should the project proceed to the next planning phase the returns will be quantified through completion of comprehensive functional requirements.

At this stage are expecting to create efficiencies and reduce errors in the **12** areas listed below in the project scope section of this document.

[Non-financial benefits](#)

In addition to the financial savings we are also expecting to achieve improvements in our operations and service through automation, systemisation and enabling 'self-service' for the following groups:

Stakeholder group
APAL staff
APAL Board
APAL members
Levy payers apple and pear
HAL
Partners

2. Project Scope

We have identified **12** functional areas that the implemented system will facilitate, these are listed below.

The project scope will be further defined by specifying a list of key features within each of these functional areas.

The Project Detail Document (a key deliverable of the next project phase), will contain:

- Estimates return on investment (ROI), saving per year based on the current operations costs, and
- Expected non-financial stakeholder / constituencies benefits of these functional areas.

At this stage new additional revenues are not estimated or included in this documentation.

Functional areas to be implemented

The identified functional areas to be implemented are:

Membership management

Members are the lifeblood of the organisation, delivering services to them and enhancing their lives is a key priority. Membership Management is therefore an essential function for Associations and many other other non-profits groups.

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.

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.

Key Membership Management features include:

- Membership cycles can be defined (calendar year, pro-rater etc)
- Membership levels and pricing can be configured
- Membership reporting tools

Membership Application

Automation of membership processes, and providing the ability for members to self serve, can represent a significant saving (operational efficiency) to your organisation at the same time as providing improved (self) service.

Online membership application and membership processing can also encourage quicker renewals and an increase the overall number of renewals and new member applications. A list of functional line items relating to Membership Application are provided below for you to include or exclude.

Key Membership Application features are:

- Individuals / corporations can apply for membership via the public website
- Members can choose applicable options and levels
- Communications and payments are handled by the system

Membership renewal

Allowing members to renew through your website in a simple and intuitive way will also create significant cost savings.

It also represents improved service and convenience to many who are happy using the internet to make payments. It allows members to renew any hour of the day or night from anywhere. This convenience can be the difference between the renewal and a lapsed member.

Key features include:

- Automated notifications of membership expiry
- Members can modify their membership types, interests and settings
- Online payments processed for renewals

Member Services/benefits

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.

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 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 their 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

Marketing Communications

Moving your communications from the traditional posting of letters also represents Commercial in confidence

Project introduction document

30 January 2015

[Produced by Skopes](#)

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

Member Directory

In some cases the publication of certain membership details back to the website is necessary. This often occurs amongst networking groups or where members are organisations and the organisational details are being published.

These directories or lists can be published publicly or log in only areas. 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:

- Members receive directory listings as part of their membership benefits
- Details to be included in the directory can be configured
- The member directory can be filtered by a range of custom options

Events Registration

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.

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.

Key features include:

- Events can be quickly and easily published onto the website
- Members receive different event pricing to non-members
- Registrants can purchase tickets to all events in a suite of events or purchase in groups

Event Administration

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.

Key features include:

- Seating allocation can be done automatically but with manual override as required
- Name tags can be automatically generated for event
- Follow up emails can be sent to both attendees and non-attendees after event

Order Management

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.

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:

- A range of online payment gateways are supported
- Orders can be processed through a number of different statuses reflecting your processes
- Integration with common accounting packages is available

Website Content Management

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.

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:

- All site content can be managed by non-technical administrators
- Menu structures and Information Architectures (site maps) can managed
- Content approval workflow is supported

Contact Database

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:

- Adding new contact details
- Managing and editing contacts and status
- Manage access and user permissions

Continuing Professional Development

Many Associations focus on assisting in improve industry standards by providing, monitoring and rewarding members for undertaking ongoing professional development activities.

The steps and actions required to be taken by members in this process vary between industries, but many are based on points systems that require tracking. 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:

- CPD goals and points can be set-up flexibility in the system
- Members can be prevented from renewing their membership if CPD goal(s) have not been met
- Members can track and manage their own CPD record e.g. to add external activities that qualify for CPD recognition

3. Price, Process, Timelines & Milestones

We intend to "go-to market" to finalise pricing, however we are provisionally recommending a project budget of **20,000**.

In addition to the financial costs, the project will also require the time, input and enthusiasm of the following team members listed in the Roles and Responsibilities section 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

4. Internal team roles

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

The next stage of the project will include more detail on this including estimated effort and individual responsibilities.

Project team

The project team leader is **Sophie Clayton**.

Team member
Sophie Clayton
Leanne Groves
Nikita Block

5. Conclusion and Next steps

To achieve the benefits we propose to deliver the project following the milestones outlined.

The next step is to specify the project process and system functionality in greater detail. This will be captured in a 'Project details' document which will be the primary reference for all stakeholders.

Please contact Sophie Clayton on cm@apal.org.au with questions and your feedback.

6. Risk Management

Identified risk	Risk type	Likelihood of occurrence
Example risk one	legal	low
Risk description		
This is an example legal risk of low level		