Expression of interest (EoI)

Briefing document

For

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# Introduction

## About this document

This document has been created to brief you and your organisation on our upcoming project and to ascertain your level of interest in participating in its delivery.

The document is intended as an introductory brief, full and detailed project documentation will be supplied to you soon, including functional requirements, should you wish to provide a quotation for the delivery of the project.

A separate EOI Response template has been provided with this briefing document. Please use this to express your interest in our project.

## Our mission

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## Our mission

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## The projects contribution to our organisations mission

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## The projects contribution to our organisations current goals

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# Project Scope

Currently we have identified a number of high level functional areas that we require the project to deliver upon.

Future documentation will include a drill down into each of these areas, specifying a list of features within each.

|  |  |
| --- | --- |
| **Functional Area** | **Description** |
| 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 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 |
| Marketing Communications | 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 |
| 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 |
| 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 |
| Resource Library | Many membership organisations have accumulated a considerable library of resources that need to be readily accessible to either to the public or, more often, available only to members as a benefit of membership.    The usefulness of this library is predicated on it being easily browsed or filtered via a variety of meta data relevant to the resources and their application.    Key features include:   - Resources within the resource library can be publicly available or restricted to members  - Metadata to be assigned to resources can be configured  - The resource library can be browsed by category or search/filtered by metadata |
| Online Store | Online stores, or mechanisms to purchase products and resources can drive considerable revenue for Associations. They are also becoming quicker and easier to build into online platforms. In combination with a willingness to purchase online, this means that the ability to generate revenue from selling merchandise and products via your website is becoming increasingly attainable and popular.    Online stores can range dramatically in complexity and sophistication, so truly specifying and costing this area of functionality can be difficult.    Key features include:   - Any number of categories/subcategories of products can be defined  - Online payment can be taken flexibly via payment systems  - Different shipping methods and pricing can be configured |

# Milestones and timelines

The project duration is expected to be **60** days.

* The intended start date is: **01 June 2014**
* The target completion date is: : **31 July 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 # | Milestone name | Date |
| 1 | Project Commencement | 01 June 2014 |
| 2 | Scoping and planning complete | 16 June 2014 |
| 3 | Interface design complete | 23 June 2014 |
| 4 | Development complete | 30 June 2014 |
| 5 | dfsdf | 16 June 2014 |
| 6 | sdsada | 24 June 2014 |
| 7 | Project Completion | 31 July 2014 |