Expression of interest (EoI)

Briefing document

For

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08 August 2014

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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.

|  |  |
| --- | --- |
| 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 |
| 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 |
| 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 |
| 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 |
| 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 **25** days.

* The intended start date is: **06 August 2014**
* The target completion date is: : **31 August 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 | 06 August 2014 |
| 2 | Supplier engaged | 08 August 2014 |
| 3 | Scoping and planning complete | 10 August 2014 |
| 4 | Interface design complete | 13 August 2014 |
| 5 | Development complete | 16 August 2014 |
| 6 | User testing complete | 25 August 2014 |
| 7 | Training complete and system live | 28 August 2014 |
| 8 | Project Completion | 31 August 2014 |