Project Charter

&

Scope of work

**Your project name**

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LCubed

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# Executive summary

## The projects contribution to our organisations mission

Projects contribution to your organisations mission

## The projects contribution to our organisations current goals

Project contribution to (medium term) organisational goals

## 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: **$** **457352**

## 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](#_Scope:_Features_and) , this table provides a summary.

|  |  |
| --- | --- |
| Number of functional areas | 9 |
| Number of features to be implemented | 95 |
| Number of expected stakeholder benefits or improvements | 4 |
| Number of cost saving features | 12 |
| Estimated yearly cost savings (ROI) | $ 457352 |

## Costs & Budget

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

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

test3

test1

test2

test4

## Timeline & milestones

The project duration is expected to be **30** days.

* The intended start date is: **01 August 2014**
* The target completion date is: **31 August 2014**

# 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

Organisations Mission

## Our goals

Organisational goals

## The projects contribution to our organisations mission

Projects contribution to your organisations mission

## The projects contribution to our organisations current goals

Project contribution to (medium term) organisational goals

# 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](#_Scope:_Features_and).

|  |  |  |
| --- | --- | --- |
| Functional area | Features in area | Total yearly savings (ROI) |
| Contact Database | 2 | $ 287588 |
| Membership management | 1 | $ 159936 |
| Membership renewal | 1 | $ 1020 |
| Member Services/benefits | 1 | $ 1008 |
| Marketing Communications | 1 | $ 480 |
| Member Directory | 1 | $ 785 |
| Events Registration | 1 | $ 1000 |
| Continuing Professional Development | 1 | $ 0 |
| Website Content Management | 3 | $ 1500 |

# 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 |
| test3 | Responsibility1 | 40 |
| test1 | erwrw | 45 |
| test2 | rtert | 6 |
| test4 | tetet | 34 |

# 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 **30** days.

* The intended start date is: **01 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 No. | Milestone name | Date |
| 1 | Project Commencement | 01 August 2014 |
| 2 | Supplier engaged | 02 August 2014 |
| 3 | Scoping and planning complete | 04 August 2014 |
| 4 | Interface design complete | 10 August 2014 |
| 5 | Development complete | 14 August 2014 |
| 6 | User testing complete | 17 August 2014 |
| 7 | Training complete and system live | 20 August 2014 |
| 8 | Project Completion | 31 August 2014 |

# Supplier evaluation criteria

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

|  |  |
| --- | --- |
| Evaluation criteria | Weight |
| Locations and logistics | 10 |
| Warrantees (products & services) | 10 |
| Company history and stability | 10 |
| Referees (your current clients) | 10 |
| References (track record) | 10 |
| Strength of project process | 10 |
| Organisational fit | 10 |
| Team (technical & relationship) | 10 |
| Match to functional requirements | 10 |
| Value for money | 10 |

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

# 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](#_ROI_&_Benefits).

|  |  |
| --- | --- |
| Contact Database | |
| **Description**  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 | **Number of features**  2 **ROI**  $287588/YR **Priority**  0 mandatory, 1 important, 1 nice to have,  **Benefit to:** |

|  |  |
| --- | --- |
| Membership management | |
| **Description**  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 | **Number of features**  1 **ROI**  $159936/YR **Priority** 1 mandatory, 0 important, 0 nice to have,  **Benefit to:** |

|  |  |
| --- | --- |
| Membership renewal | |
| **Description**  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 | **Number of features**  1 **ROI**  $1020/YR **Priority**  0 mandatory, 0 important, 1 nice to have,  **Benefit to:** |

|  |  |
| --- | --- |
| Member Services/benefits | |
| **Description**  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 | **Number of features**  1 **ROI**  $1008/YR **Priority**  0 mandatory, 0 important, 1 nice to have,  **Benefit to:** |

|  |  |
| --- | --- |
| 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**  1 **ROI**  $480/YR **Priority**  0 mandatory, 1 important, 0 nice to have,  **Benefit to:** |

|  |  |
| --- | --- |
| Member Directory | |
| **Description**  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 | **Number of features**  1 **ROI**  $785/YR **Priority**  0 mandatory, 1 important, 0 nice to have,  **Benefit to:** |

|  |  |
| --- | --- |
| Events Registration | |
| **Description**  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 | **Number of features**  1 **ROI**  $1000/YR **Priority**  0 mandatory, 1 important, 0 nice to have,  **Benefit to:** |

|  |  |
| --- | --- |
| Continuing Professional Development | |
| **Description**  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 | **Number of features**  1 **ROI**  $0/YR **Priority**  0 mandatory, 0 important, 1 nice to have,  **Benefit to:** Testsfdsfsdfdsfdsfdsfdsfsdgfsgtrst rte btr |

|  |  |
| --- | --- |
| Website Content Management | |
| **Description**  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 | **Number of features**  3 **ROI**  $1500/YR **Priority** 1 mandatory, 1 important, 1 nice to have,  **Benefit to:** |

## 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 | |
| **Notes:** | **Priority**  Nice to have  **ROI**  $35496/YR  **Benefit to:** |

|  |  |
| --- | --- |
| The data that needs to be stored for each contact can be configured | |
| **Notes:**  kjhjkhj | **Priority**  Important  **ROI**  $252092/YR  **Benefit to:** |

Membership management

|  |  |
| --- | --- |
| Membership pricing can be configured including early bird discounts, joining fee, late fee | |
| **Notes:**  hfghf | **Priority**  Mandatory  **ROI**  $159936/YR  **Benefit to:** |

Membership renewal

|  |  |
| --- | --- |
| Payments for renewals collected online, and invoices generated | |
| **Notes:**  45345 | **Priority**  Nice to have  **ROI**  $1020/YR  **Benefit to:** |

Member Services/benefits

|  |  |
| --- | --- |
| Non-members (contacts or lapsed members) can also update details | |
| **Notes:**  5546 | **Priority**  Nice to have  **ROI**  $1008/YR  **Benefit to:** |

Marketing Communications

|  |  |
| --- | --- |
| Different subsets of members can be targeted based on membership type | |
| **Notes:**  I likey | **Priority**  Important  **ROI**  $480/YR  **Benefit to:** |

Member Directory

|  |  |
| --- | --- |
| Member directory is accessible to the general public | |
| **Notes:**  terte | **Priority**  Important  **ROI**  $785/YR  **Benefit to:** |

Events Registration

|  |  |
| --- | --- |
| Events can be quicklyand easily published onto the website | |
| **Notes:**  Details about why... | **Priority**  Important  **ROI**  $1000/YR  **Benefit to:** |

Continuing Professional Development

|  |  |
| --- | --- |
| Any number of different CPD goals can be defined to reflect different requirements for different types of members | |
| **Notes:** | **Priority**  Nice to have  **ROI**  $0/YR  **Benefit to:**  Testsfdsfsdfdsfdsfdsfdsfsdgfsgtrst rte btr |

Website Content Management

|  |  |
| --- | --- |
| All site content can be managed by non-technical administrators | |
| **Notes:** | **Priority**  Mandatory  **ROI**  $1500/YR  **Benefit to:** |

|  |  |
| --- | --- |
| Menu structures and Information Architectures (site maps) can managed | |
| **Notes:** | **Priority**  Mandatory  **ROI**  $0/YR  **Benefit to:** |

|  |  |
| --- | --- |
| Administrators can be limited in the sections of site content that can manage | |
| **Notes:** | **Priority**  Mandatory  **ROI**  $0/YR  **Benefit to:** |