Project Charter

&

Scope of work

**ede**



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# Executive summary

## The projects contribution to our organisations mission

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## The projects contribution to our organisations current goals

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## 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: **$** **610**

## 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 | 4 |
| Number of features to be implemented | 93 |
| Number of expected stakeholder benefits or improvements | 1 |
| Number of cost saving features | 4 |
| Estimated yearly cost savings (ROI) | $ 610 |

## Costs & Budget

We are going to market to finalise pricing, however we are suggesting allocating a provisional project budget of **2**.

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

w

a

w

w

w

w

a

a

g

t

y

## Timeline & milestones

The project duration is expected to be **9** days.

* The intended start date is: **19 February 2015**
* The target completion date is: **28 February 2015**

# 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

To attain goal

## Our goals

dfr

## The projects contribution to our organisations mission

ed

## The projects contribution to our organisations current goals

ede

# 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 | 1 | $ 180 |
| Membership management | 1 | $ 180 |
| Membership renewal | 1 | $ 125 |
| Member Directory | 1 | $ 125 |

# 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 |
| w | wew | 2 |
| a | wew | 2 |
| w |  | 0 |
| w |  | 0 |
| w |  | 0 |
| w |  | 0 |
| a |  | 0 |
| a |  | 0 |
| g |  | 0 |
| t |  | 0 |
| y |  | 0 |

# 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 **9** days.

* The intended start date is: **19 February 2015**
* The target completion date is: **28 February 2015**

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 | 19 February 2015 |
| 2 | Supplier engaged | 26 February 2015 |
| 3 | Project Completion | 28 February 2015 |

# Risks and Risk Management

This project is a significant undertaking and may involve some risk. We are therefore following a risk management program to highlight these risks, mitigate and plan for issues that may arise.

**dw**

|  |  |  |
| --- | --- | --- |
| Person responsible | | Risk type |
| dw | | legal |
| Likelihood of occurrence | Significance of impact | Monitoring cycle |
| low | critical | 0 |
| Risk description | | |
| dwdwdwd | | |
| Mitigating actions | | |
| e2e2 | | |
| Procedure for addressing occurrence | | |
| e2e | | |

**yh**

|  |  |  |
| --- | --- | --- |
| Person responsible | | Risk type |
| yh | | legal |
| Likelihood of occurrence | Significance of impact | Monitoring cycle |
| low |  | 0 |
| Risk description | | |
| hy | | |
| Mitigating actions | | |
|  | | |
| Procedure for addressing occurrence | | |
|  | | |

# 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**  1 **ROI**  $180/YR **Priority**  0 mandatory, 0 important, 1 nice to have,  **Benefit to:** |
| **Notes:** | |

|  |  |
| --- | --- |
| 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**  $180/YR **Priority**  0 mandatory, 0 important, 1 nice to have,  **Benefit to:** |
| **Notes:** | |

|  |  |
| --- | --- |
| 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**  $125/YR **Priority**  0 mandatory, 0 important, 1 nice to have,  **Benefit to:** |
| **Notes:** | |

|  |  |
| --- | --- |
| 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**  $125/YR **Priority**  0 mandatory, 0 important, 1 nice to have,  **Benefit to:** |
| **Notes:** | |

## 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**  $180/YR  **Benefit to:** |

Membership management

|  |  |
| --- | --- |
| Membership pricing can be configured including early bird discounts, joining fee, late fee | |
| **Notes:** | **Priority**  Nice to have  **ROI**  $180/YR  **Benefit to:** |

Membership renewal

|  |  |
| --- | --- |
| Automated communications to member through renewal workflow are supported -e.g. renewal reminder, renewal acknowledgement | |
| **Notes:**  5 | **Priority**  Nice to have  **ROI**  $125/YR  **Benefit to:** |

Member Directory

|  |  |
| --- | --- |
| Details to be included in the directory can be configured | |
| **Notes:**  b | **Priority**  Nice to have  **ROI**  $125/YR  **Benefit to:** |