Business Case

E2F – Environment towards a better Future

The information used in this business case is fictitious and is intended solely to support the GPI practices. Any similitude with people, companies or institutions is purely casual.

1   Introduction

This document presents the business context of the *E2F* project, presenting the business context basis to evaluate the project's feasibility and to give guidance to the project planning processes.
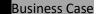
2   Brief Project Description

E2F *(Environment towards a better Future)* is a Portuguese professional association with about five hundred associated individual members and one hundred institutional associates spread throughout the country.

This association, being relatively recent, has attracted many professionals looking for the improvement of their competencies on environmental issues. This improvement involves not only to gest easy access to national and European legislation in these areas, but also the possibility of attending online courses made available by the association. These courses are the result of numerous agreements between the association and the national and international academic environmental community.

Since its foundation, E2F has used a financial information system (ISTFin) provided and supported by an external provider, the ISTExpert company. All other data, namely related to members' registration, course management and library management have been supported by a set of MS-Excel files, shared in a Google Drive environment. This solution is not efficient enough and shows significant problems in what concerns managing personal, and for instance, does not support the application of existing European legislation for data protection.

The growth of E2F requires a new and secure information system, able to overcome the current problems and limitations referred above.

3   Business Objectives

This project intends to:

- Overcome the above-mentioned limitations;
- Improve the efficiency of business processes concerning the management of: Memberships and Membership quotas; Courses and participations; Documentation and academic references;
- Implement an effective communication system with and between associates.

4   Project objectives

4.1 Scope

E2F wants to overcome the limitations explained above with a new information system that would integrate and provide access to the following application modules:

- Associates/Memberships management
- Training management
- Library management
- Electronic voting
- Communication with and between associates

Also, the project shall include:

- Integration with the financial system (ISTFin)
- Migrate excel data to the new system
- E2F personnel training (E2F end-users)

The required software and all customization, implementation, and installation services shall be contracted to an external supplier.

4.1.1 Associates management module

This module will allow to record individual and institutional associate's data, quotas payment status, associates' rights (including voting rights), and system accesses.

This module is supposed to result from the customization of an information system already used in different Portuguese professional associations.

4.1.2 Training management module

This module will allow to make available courses enrolment, materials, forums and other training support. This module shall be supported using a customization of the Moodle open-source system (see https://moodle.org).

4.1.3 Library management module

This module will be supported by an existing solution. That solution is provided by the company ISTExperts. The proponent should subcontract this company encompassing the solution of the new information system.

4.1.4 Electronic voting module

This module should allow the association members to vote in general boards and other meetings in which voting could be required.

4.1.5 Communication module

This module shall include a web site that shall include integration with social networks and other communication features. Considering the foreseen difficulty to define, from the very beginning, the scope of this module, as well as its expected evolution, it was decided that its implementation shall be based on the SCRUM agile methodology.

4.2 Time

The project proposals shall be delivered until the 28th of November to guarantee the project start in the first week of December 2020.

The system shall be operational 5-months after the project plan approval, with less than 2-weeks tolerance.

The contractor shall offer a minimum warranty period of 3-months.

4.3 Cost

The project has an approved budget of € 200.000 (80% of this amount is sponsored by an EU program). The accepted budget variance (by the end of the project) shall be less than 5%.

5 Expected benefits

With the investment in this project the following benefits are expected:

- Increase the number of individual associates by 50% in one year after the project roll-out;
- Increase the number of institutional associates by 20% in one year after the project roll-out;
- Have less than 15% of quotas payment delays greater than 2 months, 1 year after the project roll-out.

6 Locals

The project development activities that do not require direct interaction with members of E2F shall be performed at the Supplier's offices.

All interactions with E2F will be at its headquarter in Lisbon, however, Training shall take place in Lisbon and Coimbra, involving respectively 8 and 5 end-users.

7 IT Infrastructure

This new system shall be deployed in an IT infrastructure (e.g., including hardware, network, cloud services) to be provided by the E2F association, this means it shall be used the IT infrastructure that already exist.

8 General System Requirements

The new system shall meet the following general quality requirements:

- Ability to handle a minimum of 1000 concurrent accesses with the following response times: Transactions queries - faster than 5 seconds; and Input/update transactions - faster than 15 seconds.
- Number of non-conformities during acceptance tests – not greater than 20%;
- Time for non-conformities correction – less than 24 hours;
- Training sessions evaluation – not less than 3,9 (0 to 5 scale).

- Usability requirements: Understandable; Easy to learn; Easy to use, not requiring complex training for E2F employees.
- Security and safety: Access security; Incremental backups; and Transaction recovery.
- Privacy: Personal data protection regulations and system access requirements shall be strictly accomplished by the contractor.

9   Organization context

The supplier shall appoint a project manager who will report to the E2F project manager. The supplier is also responsible to set-up a project team, with the competences the project requires, and is accountable for their performance.

E2F project team will be organized as defined below:

- Project Owner: the E2F President.
- Project Manager: the E2F Secretary
- E2F President will appoint: One accounting specialist; One secretary staff responsible for maintaining the members' data and monitoring the payment of quotas; A member of E2F board of Directors, responsible for communication, partnership and marketing; A member of E2F board of Directors, responsible for online training and library.

10 Uncertainties risks and opportunities

To be identified by the contractor.

11 Financial assessment

Considering that E2F is a non-profit organization the project's financial assessment was not considered.