

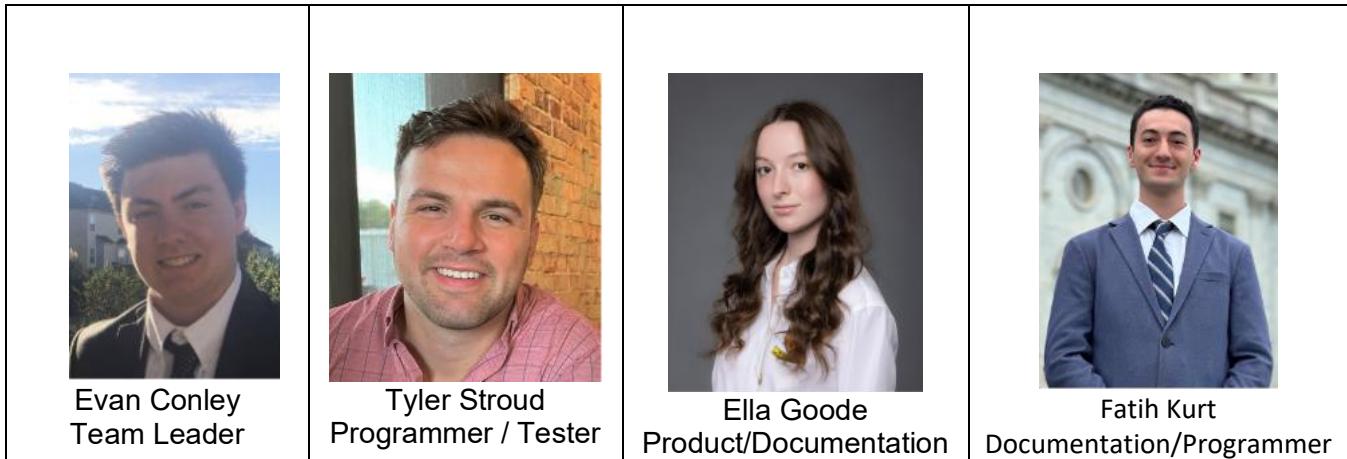
## 03 – Management System for Non-Profit

---

CS 4850, 04 & 01, Fall 2025, August 31, Sharon Perry

### Project Team

<b>Roles</b>	<b>Name</b>	<b>Role</b>	<b>Contact (Cell Phone)</b>
Project owner	Georgia Laws of Life Essay	Sponsor of the project	
Team leader	Evan Conley	Team Leader; Ensure deadlines are met and project is completed to standard	404.977.0180
Team Members	Ella Goode	Product/Documentation	678.637.7634
	Tyler Stroud	Programming/Testing	770.880.7389
	Fatih Kurt	Documentation/Programming	770.814.1049
Advisor / Instructor	Sharon Perry	Facilitate project progress; advise on project planning and management.	770-329-3895



### Overview

#### Background

Georgia Laws of Life Essay Contest is a 25-year-old 501(c)(3) nonprofit that facilitates a statewide character education program in partnership with high schools and Rotary clubs. The program engages students through an annual essay contest, having collected over 800,000 essays to date. However, the organization currently manages its operations using disconnected spreadsheets, making it difficult to track student participants, school contacts, Rotary partners, donors, and overlapping events. They are uncertain whether a CRM, donor management, or project management tool best suits their needs. This project will evaluate available free/freemium tools, propose a suitable solution, and deliver a proof-of-concept system tailored to their operations.

## **Objectives**

The primary objective of this project is to analyze the nonprofit's operational workflows and stakeholder relationships and to identify, evaluate, and prototype a suitable centralized management solution. This will be achieved by assessing freemium Software-as-a-Service (SaaS) platforms such as Zoho CRM, HubSpot CRM, Airtable, and Trello. These platforms will be utilized for CRM, donor management, and project/event management functionality. The project will deliver a proof-of-concept system configured to demonstrate centralized tracking of students, schools, Rotary clubs, and donors along with management of entity relationships and communications and coordination of event workflows. These functionalities will be integrated with the organization's existing Google Workspace environment.

## **Scope**

The project scope includes requirements analysis and entity mapping, comparative evaluation of SaaS platforms, and the development of a proof-of-concept utilizing a selected tool. The implementation will demonstrate core functionalities, including data import/export via the Google Sheets API and event tracking. Final deliverables will include a platform evaluation matrix, a configured proof-of-concept, and a complete implementation roadmap. The project explicitly excludes any custom software development or the use of paid software licenses. With that in mind, the focus will solely be on the evaluation and configuration of existing freemium SaaS solutions.

## **Deliverables**

### **Expected Deliverables:**

- Requirements and stakeholder/entity mapping document
- Platform evaluation matrix
- Proposed solution and configuration rationale

- Working proof-of-concept demonstrating student tracking, related entities (school, Rotary, lifecycle), and event workflows
- Implementation roadmap
- Cost breakdown and upgrade options
- User guide and documentation

## **Group Meeting Schedule Date/Time**

The group will meet with the sponsor, Georgia Laws of Life Essay, on a biweekly basis on Wednesdays at 9am EST. The first meeting date will be on August 27<sup>th</sup> on Microsoft teams. Every meeting will take place with Microsoft Teams following the first meeting and will be done to ensure that accurate information and updates are given to the sponsors on how development is coming on the project.

Outside of meeting with the sponsor the group will also plan to meet with each other on the weeks that the meetings with the sponsors are not taking place through Discord. This is to ensure that everyone is staying on task and is able to complete their part of the project on time and to facilitate any group discussions that may arise during the time of working on the project.

## **Collaboration and Communication Plan**

The plan to communicate as a team is to use GroupMe for reminders and things that do not require a physical meeting but require that the whole group is aware of important information. When it comes to meeting as a group, the group will use Discord to meet when it comes to collaboration that requires face-to-face meetings. This gives us more flexibility when it comes to scheduling and gives us a chance to meet and talk through things that otherwise would not be possible without Teams.

For communication from person to person we plan to use phone numbers as a way to send messages to each other if an individual question arises that does not require the whole group to be notified. If phone numbers are not available, the backup plan is to direct messages from GroupMe. In the case that a group member has something happen where they cannot use their number for text purposes, the ability to use GroupMe on mobile or desktop will provide us a failsafe to contact someone directly.

## Project Schedule and Task Planning

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Project Name: Report Date:	03-Management System for Non-Profits 8/31/2025																	
4	Deliverable	Tasks	Complete%	Current Status Memo	Assigned To	Milestone #1				Milestone #2				Milestone #3				C-Day	
						08/24	08/31	09/07	09/14	09/21	09/28	10/05	10/12	10/19	10/26	11/02	11/09	11/16 11/23	
5	Requirements & Solution Outline	Meet with stakeholder(s)	0%	Ella, Fath, Evan	5														
6		Define requirements		Ella, Fath, Evan															
7		Review requirements with stakeholder(s)	0%	Ella, Fath, Evan	5	10													
8	Stakeholder Mapping Document	Create stakeholder mapping document	0%	Tyler		15													
9	Implementation Plan	Define tech required *	0%	Tyler			10												
10		Research CRM and Project Management Software	0%	Ella, Evan				10											
11	Cost Breakdown	Research upgrade options and costs	0%	Fath, Tyler				5	5										
12	Solution and configuration rationale	Develop report for best Software Solution	0%	Ella, Fath				10	10										
13		Create prototype account for the Software Service selected	0%	Tyler, Evan				10	15										
14	Implementation Roadmap	Test prototype	0%	Tyler, Evan					5	10									
15	Proof of Concept	Develop working and complete Proof of Concept	0%	Tyler, Evan						5	10	10							
16		Review original requirements	0%	Ella, Fath						10	20	20							
17		Test Product for Quality Assurance	0%	Evan, Tyler							20	20							
18	User Guide	Develop User Guide and Documentation	0%	Ella, Fath							10	20							
19	Final report	Presentation preparation	0%	Whole Group												15	10		
20		Poster preparation	0%	Whole Group														15	15
21		Final report submission to D2L and project owner	0%	Evan															5
22				Total work hours	350	10	10	25	25	10	35	35	15	20	30	50	40	15	30
23																			
24																			
25																			
26																			
27	Legend																		
28		Planned	350 Hours																
29		Delayed																	
30		Number Work: man hours																	
31																			

## Risk Assessment

With budget concerns being an issue for Georgia Laws of Life Essay, the biggest risk that is associated with this project is unknown and unaware cost of the software. Because of the nature of Software as a Service, some products do carry hidden cost or pricing models that do not always give a clear idea of the total cost of ownership that comes with using the product.

To combat this issue certain practices will be implemented to ensure that cost overrun does not occur. First, when looking at the Software as a Service models, not only will the cost of the model be taking into account and how they are charging, but also looking at terms and conditions that these companies are required to provide, to get a better understanding of how pricing will work. Second, working with the non-profit, we will get a better understanding of their plans and growth. If they are looking to expand and get more employees in the next years, growth and scaling will also be used to determine the best option. Many Software as a Service accounts restrict the number of users for lower cost tiers, so growth of the non-profit will be taken into consideration.

## Version Control Plan

The plan for version control is to establish a team Github page. After each iteration of the product that satisfies the group, we will save this version of the code into Github. This system will allow us to continuously develop the software, but if we reach a point in trying to upgrade the software where we are not successful and need to retreat to a previous version, we will have Github to wipe the unsuccessful software and revert back to the saved code, allowing us to have checkpoint instead of needing to restart the whole project. Github will also allow us checkpoints in the case that something happens when developing code, we have a saved version that we can access.

Every new version of the code will be saved separately and not overwritten when being saved in Github. Once the final version is developed, tested, and approved we will then archive the code in Github so that the only version that is present is the final version, but still having access to the other version.