# Project Charter/Scope Statement

| Project Name | Smallville Education Foundation (SEF) | Delivery Date | **11/29/18** |
|---|---|---|---|

| Project Background/Description of the Business Need |
|---|
| < Why is the project being undertaken? Describe an opportunity or problem that the project is to address> |
| **Smallville Education Foundation**'s mission involves fundraising to provide resources for K-8 students beyond what is provided through conventional public funds. SEF has been using a donor management tool called Donor Perfect since the 1999-2000 school year, but is paying $6,000 a year for this platform. This price will continue to rise as SEF's constituency grows. <br><br> SEF is a 501(c)(3) nonprofit corporation and was recently granted 10 free user licenses by Salesforce.org. It wants to migrate all of its records from Donor Perfect to Salesforce and the Nonprofit Success Pack (NPSP). This will save SEF over $6,000 a year and allow SEF to add and train more users beyond those who are currently using Donor Perfect. <br><br> SEF's staff will also have convenient access to a wide array of mostly free resources, including Trailhead training modules, the Trailblazer Success Community, online articles, videos, and the annual Dreamforce convention held in San Francisco. Other benefits include, but are not limited to, access to third-party apps through the Salesforce App Exchange, more enhanced and nuanced tracking of donors and their gifts, and being a part of the Salesforce ecosystem which currently serves over 30,000 nonprofits worldwide. <br><br> With the release of its newest strategic plan in the 2017-2018 school year, this Salesforce implementation represents a decision by the Board of Directors to cast a wide net to **all** of the Smallville School District (SSD) alumni. Many past graduates do not actively support SEF yet value the substantial and varied education they received throughout their formative years in the SSD. They will happily pay it forward for future alumni. <br><br> The Strategic Plan also calls for pursuing grants beginning in the 2019-2020 school year. The Salesforce NPSP can support Grants Management functionality for this future endeavor. <br><br> There's a sense of organizational urgency from SEF's President and VP of Development to start this implementation during the last week of November when the SEF staff can take a break from their general fundraising responsibilities. |
|  |

| Project Overview – How the Deliverable will meet the Business Need |
|---|
| This Salesforce implementation with the Nonprofit Success Pack (NPSP) for the Smallville Education Foundation will match the current functionality that the Donor Perfect system provides. For example, the new SEF Salesforce org will be able to track donations from all of the current methods (check, cash, credit card, etc), including the Scholar's Circle Giving Levels through the use of Opportunity records. |
| Moving to Salesforce will break down current data silos caused by a limited number of users on the current Donor Perfect system. |
| New donor data files, which SEF receives 3 times per year, can be imported through the Salesforce Data Import Wizard. |

| Customized reports will display the following donor data: |
|---|
| ● YTD (Year to Date, refers to the first day of the current school year up to the current date) |

Customized reports will display the following donor data:
- YTD (Year to Date, refers to the first day of the current school year up to the current date)
- READ YTD (Read-a-Thon YTD)
- FAN YTD (Fund-a-Need YTD)
- YTD without Matching (Year to Date without Matching donations from employers)

Customized dashboards will display and track progress toward the following goals set:
- $ Raised
- # of Families
- # of Families at Scholar's Circle Giving Levels

Campaigns will capture individual events and the donations they raise through the use of Campaign records.

The five schools included in the Smallville School District will each have its own Account record and families will be related to these accounts through Affiliation records.

Students and their family members will each have their own Contact records which will fall under Household accounts. Contacts, including extended family members from outside a student's immediate family, can be identified within households through Relationship records.

Community members who are not affiliated directly with a school will also be entered as Contacts.

| Top Project Goals |
|---|

1. I will import a subset of SEF's data and test this data to ensure it has been correctly mapped and that relationships and affiliations are intact. I will work directly with SEF's VP of Development prior to the import to ensure I receive final approval of the Object and Field mapping from Donor Perfect to Salesforce.

2. I will create separate Profiles for the VP of Development and the Site Directors to define specific actions. I will also create a Role Hierarchy to define what specifically each role can see.

3. I will create Campaigns for the following recurring SEF events:
- Annual Campaign
- Read-a-Thon (READ)
- Dinner Dance and Auction
- Fund-a-Need (FAN)

4. I will customize Opportunity fields and its page layouts for ease of donation input and tracking

5. I will create the following email templates that SEF staff can send to its donor base:
- thank yous
- outreach messages
- event invitations

6. I will run test reports and set up dashboards to meet the needs outlined by the VP of Development and of his team of Site Directors (SDs). Site Directors are responsible for development at each of the 6 SSD schools.

7. I will provide on-site training for the VP of Development and the team of SDs, as well as provide up to 3 month's of continued support beyond the launch of the SEF's new Salesforce org.

| Project Scope |
|---|

[What will be the end result of the project? Describe what phases of work will be undertaken. It's also important to mention what activities will not be included in this project.>

**Discovery phase**: I will meet with SEF's VP of Development to understand and analyze what he currently likes and what he finds challenging with the Donor Perfect system. I will then hold a meeting with all 6 of the

| |
|---|
| Smallville School District Site Directors to understand and analyze what they like and find challenging with the Donor Perfect system. Following the meeting with the SDs, I will quickly follow-up with 1:1 meetings with each of the SDs to observe how they work with Donor Perfect. |
| **Mapping phase** (pre-Implementation): I will work closely with the VP of Development to ensure that he has identified all of the Donor Perfect fields he wants to map to Salesforce. He should do this under the direction of SEF's President. I will produce the final schema which will be approved by the VP of Development. |
| **Implementation phase**:  Following the schema, I will build-out / customize the SEF Salesforce org, install the NPSP, and import the data subset provided by SEF. |
| **Testing phase**: I will work directly with the VP of Development to test the functionality based on the "Project Overview" and "Top Project Goals". I will also train him how to export data from Donor Perfect, and how to import this data into the new SEF Salesforce org using Data Loader. |
| **Reconfiguration phase 1**: I will reconfigure functionality based on feedback from the VP of Development |
| **Testing phase**: I will work directly with the VP of Development, the Lincoln SD and the Smallville Intermediate SD to test the functionality |
| **Reconfiguration phase 2** (if necessary): |
| **Training (Final phase)**: Roll-out the SEF Salesforce to all of the end users for group and individualized training |
| **Not included in this project**: In the interest of time and efficiency, I will not be meeting with the President during this project, and I will not go beyond 2 Reconfiguration phases.<br><br>Also outside of the scope of this project:<br>● Donations processed and received through an online fundraising portal and payment processing system<br>● Data transfer of Donor Perfect data beyond the Sample School Data provided<br>● Grants Management functionality |

| Project Stakeholders |
|---|
| There are a total of 4 project stakeholders:<br><br>1. SEF's President<br>2. SEF's VP of Development<br>3. Site Director (SD) from Lincoln Elementary School<br>4. Site Director (SD) from Smallville Intermediate School<br><br> |

| Project Milestones | |
|---|---|
| Milestones | Estimated Date of Completion |
| 1. Project Start | 11/19/18 (Monday) |
| 2. Project Requirements ("Smallville Education Fund Requirements Specification"). This document will include Requirements and Functional Requirements based on an analysis of outcomes from Discovery meetings (with VP of Development and Site Director group) | 11/21/18 (Wednesday) 16 hours |

| | |
|---|---|
| 3.  Project Requirements Approval by VP of Development | 11/26/18 - 11/27/18 (Mon-Tues) |
| 4.  Complete Salesforce Developer Org set-up and NPSP installation. Begin preliminary customization: Profiles, Role Hierarchy, Permission sets, etc. | 11/19/18 (Monday) 5 hours |
| 5.Customization: Fields, Page Layouts, Campaigns, Reports and Dashboards | 11/25/18 (Sunday) 10 hours |
| 6. Prepare / Clean data subset. Import data subset | 11/26/18 (Monday) 2 hours |
| 7. Produce a presentation slide deck and click path script | 11/27/18 (Tuesday) 2 hours |
| 8. Presentation / Project Completion | 11/29/18 (Thursday) 1 hour |
| Total Estimated Length of Project | **36 hours** |

| Project Deliverables |
|---|
| 1. Discovery meeting with VP of Development |
| 2. Discovery group meeting with Site Directors (SDs) |
| 3. 1:1 meetings with each of the SDs |
| 4. Smallville Education Fund Requirements Final Schema |
| 4. Proposed Mapping and Schema |
| 5. User (VP of Development) testing |
| 6. User (Site Director) testing |

| Project Constraints |
|---|
| 1. VP of Development and Site Directors will be out of the office from Wednesday, 11/21/18 - Friday, 11/23/18 for the Thanksgiving holiday. |
| 2. Working on a minor deliverable for another client |
| |

| Project Assumptions |
|---|
| [ Describe here conditions or situations that you are relying on in order to achieve project goals] |
| 1. To achieve project goals, I will have direct access to the VP of Development, and to a lesser extent, the Lincoln Elementary School Site Director, and the Smallville Intermediate School Site Director. |
| 2. The SEF President has appointed the VP of Development leadership of this project. He will be my point of contact on this project and approve of my deliverables. |
| 3. Full data transfer from Donor Perfect to the new SEF Salesforce org is outside the scope of this project. However, I will train the VP of Development how to export the data from Data Perfect and import it to Salesforce using Data Loader. |

| Project Risks and Dependencies |
|---|
| [What are the most significant risks? What things must happen before the project is delivered?] |
| 1. Dependent on the VP of Development providing me with a current subset of the Donor Perfect data |
| 2. Dependent on the VP of Development approving of the final schema prior to customization / build-out |

| Decision | | | |
|---|---|---|---|
| ☐ Approved | | ☐ Rejected | |
| ☐ Approved with modifications | | ☐ Deferred | |

| *Required Modifications* |
|---|
| |

| *Additional Comments* |
|---|
| |

_____         _____

Approver's Printed Name                                    Date


_____

Title


_____

Signature

Scope Statement