Cycle Plan Template

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| Project Name | Website – Members Pages Sprint | | |
| Developed by | TW, HK, JS, JL, CM (9/1 meeting) | Sponsor | SW Board |
| DMAIC Phase(s) | Analyse | **Cycle No:** | 5 |

1. Plan

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| Objective |
| Define needs and provide clear guidance to VMware of requirements |

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| Questions | Predictions |
| 1. What information do we need to capture / display for individual members page 2. What information do we need to capture / display for overall members list 3. What can people edit as a member 4. Who can do what – member vs administrator 5. How do we translate this info onto the membership cards | 1. Membership data 3. Revise initial mock-up with different column headings |

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| Activity | Who | By When |
| Review current web mock up for individual members and comment on items, generate list of missing “things” or desired functionality | SW group | 10/1 |
| Review current web mock up for members list and comment on items, generate list of missing “things” or desired functionality | SW group | 10/1 |
| Understand and resolve training nuances and requirements for rescue and care | SW group | 17/1 |
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**Reflections / Learning**

1. Do

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| Observations in carrying out plan (park it notes) |
| Much discussion on the training needs and nuances on babies vs adults vs training – needs to be worked through to a resolution, give VMware draft matrix as idea generator |

1. Study

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| Analysis of data |
| It was assumed that the pages supplied are for general members use and NOT used for searching for a member to undertake a rescue in the office situation. All comments are provided based on this assumption.  **Individual Members Page:**  Member can ONLY access this page for their own details – not other members.  Scroll bar down LHS shouldn’t have individual members down the side but this might be useful(?) to admin.  Could have additional functions to add a new members, browse coordinator, browse branch and browse board members? – *resolve with VMware as to options*  Button titled “Members and Coordinators” – relabel “Members”  Layout feedback, requirements and security   |  |  | | --- | --- | | **Area** | **Update** | | Photo:  Member can upload own photo (if they don’t like the one posted), but can this go through a simple approval process prior to upload acceptance so we don’t get avatars and the like appearing? | Member with approval | | Address details:  requires postal address details, “work” heading not required as only need the work suburb, should only allow for 1 email address, the 3 phone numbers together with home details | Member | | Membership to include:  ID, Branch, membership status (Current; Companion; Fundraiser; Not Active; Office Volunteer), join date, rename “active until” to “expiry date” | Admin | | Trained *(see below for further comments)*  Include Matrix supplied – this is to be an admin only update function | Admin | | Coordinator – cool | Admin | | Availability:  Need only 3 times and aligned to the office hours  9am-1pm, 1pm to 5pm and 5pm to 9am (or morning, afternoon, evenings)  Add a rescue and a care tick box | Member | | Other positions held – board and branch to be included (could just list if they do an additional role) – see below for coordinator, branch and board screens | Admin | | Add box – My Human Buddy – each new member gets a “mentor” or buddy assigned at basic training on day 1 | Admin | | Add personal licences:   |  |  |  | | --- | --- | --- | | Licence Type | Tick Box | Licence Number | | Reptile |  |  | | Bird |  |  | | Frog |  |  | | Mammal |  |  |   We can then search on if they have a licence – giving the licence no isn’t mandatory if they tick a box | Member | | Add “Occupation” box | Member | | Add “aviary details”   |  |  | | --- | --- | | Tick Box | Number and size | |  | *Free text area* | | Member | | Available for emergencies – tick box (full page to be developed later down the track, v2) | Member | | Only if room: would still like to see google earth map for home and work address | Admin/Auto |   **Overall Layout**  Good design would be to have the “member updatable” information on the top half of the page + membership details as laid out.  Non-member updatable should be on the lower half  At full discretion of web designer of course ☺  **Coordinator, Branch and Board Page**   * See attached for coordinators and branch combined (coordinators 2012 – 13)   Board Members could look like:   |  |  |  | | --- | --- | --- | | Name | Position | Branch | | Sonja Elwood | Chair |  | | Wendy Williamson | Vice Chair |  | | Lindsay Bridgland | Treasurer |  | | Helen Kennedy | Secretary | NW | | Wendy Williamson | Public Officer |  | | Trent Reed | Statistics & Office |  | | Tony White |  | NW | | Carolyn Martin |  |  | | Kerry Ellis |  | S | | Claire Newman |  | IW |   Perhaps for board and branch positions outside the coordinators, these could be updated by admin on separate page and just brought across to the members individual page,  **Membership List Page**  Comments based on the following assumptions:   * you can sort on title across columns and * a multi-search criteria down LHS to narrow the parameters   “Area” to be “Branch” consisting of:  Inner West; North West; Northern Beaches; Northern Districts; South West  Don’t require “Coordinator for” down LHS  **Membership:**  Need to include “Rescue” and “Care”  **“Guts” or columns**  Name – can this be split into 2 columns, first and last name?  Branch (rename from Area)  Suburb  Phone Numbers – the 3 in one column is excellent  Email Address  Coordinator For  Rescue tick box  Care tick box  Aviary tick box    We determined; availability, trained for and joined were not required fields for general members  **Printing of Lists**  This list should then be able to be printed as a hard copy  **Training Matrix**  There is a complexity in the Training of people (courses) against rescue or care and adult or baby as there are differing requirements for specific species and no one rule fits all.  It was determined that whatever is produced is managed by Admin as this is only needed to be updated once a training course is completed for a person and the workload won’t be that high. A general higher level override for the member to manage could be in the availability section with the addition of rescue and care buttons – if these are ticked, then the training table comes into play.  An initial matrix was put together and provided as a draft and needs to be further investigated. |

1. Act

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| Recommendations |
| Work with VMware to:   * Resolve LHS scroll bar on members page and admin functions * Photo use (how to upload, member approval issue, how we can use for membership card + other details on card) * Handling coordinator, branch and board positions * Confirm column filtering on member list * Confirm how search function will work – is it multiple ticks and then search for that specific criteria * Printing of overall list   Resolve the Training Matrix issue to:  Maximise automation, minimise complexity in programming, ensure it meets the needs of the business, not intended to replace human interaction – there still needs to be phone calls to resolve so we are not trying to incorporate every permutation possible.  Resolve how we manage our mailing lists for renewals and newsletters since we have removed the “address” column – how can Admin get access to a list with postal addresses from this and other expanded fields (eg. member no)? |

**Checklist for Plan**

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| No rhetorical questions  No questions restated  Questions useful for learning (clear, concise)  No obvious missing questions  All questions related and relevant | Predictions are specific, not general  Predictions include why they believe these predictions (personal experience, data available)  PDSA seems reasonable in size – achievable in a reasonable timeframe |