

PROJECT CHARTER

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Summary of Project

The non-profit organization SageUSA provides advocacy and services for the aging LGBT population. SageUSA main focus are three-fold: 1) to provide nation-wide technical assistance for LGBT seniors; 2) building capacity by providing workshops and leadership development, and 3) advocacy work in political mobilization and policy research. In order achieve their mission, leadership at SageUSA recognizes the value of a connected and reliable data infrastructure to build analytics and insights around business cases.

SageUSA requires a restructuring of organizational data infrastructure to realign multiple channels of information-intake from various stakeholders differing in the level of permissions, comfort with digital tools, and business needs. The organization requires a new infrastructure that provide reliable and consistent data for efficient analysis as they pivot their mission to provide technical assistance, capacity-building, and advocacy work.

As a result, the organization has brought in AT Kearney consulting team for initial assessment and planning. In its current iteration, SageUSA invites BAH staff for added capacity and strategic planning in the Phase 2 of its implementation.

Problem

There is no current policy of data usage for stakeholders—i.e., users in their respective departments—at SageUSA in the implementation process. Without common guidelines, it will be difficult for to maintain sanitized data after the adoption of Salesforce.

Objectives:

To achieve high-level objects in the following pillars:

Consistent Adoption

- Requires both a cultural and shift.
- Staff buy-in is extremely important for a successful roll-out plan. This also addresses the client's challenges in inconsistent cooperation from staff on page 8 of the Data Infrastructure General Information document.
- Requires a standardized vocabulary and set of common working agreements on who may access the data, to what capacity, and in what circumstances. Although the pillar cannot address the legacy data, it provides guidelines moving onward to mitigate heterogeneous and invalid data inputs into Salesforce.

2. Reliable data across the organization

- The standardized common working agreements also addresses this objective.

Process Map:

- 1) Schedule meetings with representative from SAGE to obtain feedback on the project charter document and timeline moving forward.
- 2) Obtain qualitative and quantitative data on staff engagement with current technologies. Questions that need to be answered are:
 - a. How does users in Direct Services, Volunteers, Engagement, and Devo
 - b. What other informal digital systems/tools are staff using on a daily and weekly basis—file system, photo storage, cloud service, softwares, communication tools, CRM, SaaS
 - Google Drive, Google Sheet, Dropbox, AWS S3, Photoshop, Outlook, Gmail, etc.
 - c. What are the level of conform with current digital tools and systems for data intake?
 - d. Identify user stories from interviews and reports with the representative.
- 3) Using the provided High-level data flow chart, clarify on the business needs to create individual user stories for the following users:
 - a. Volunteer
 - b. Participant
 - c. Trainee
 - d. Affiliates
 - e. Virtual Supporters
 - f. Donor
 - g. Training Provider

The term “user” could be defined as a person, or a system that generate, upload, and update data. In another words, a user could be any entity that requires access to data, in one capacity or another.

- 4) Allow time for feedback on the new high-level data flow chart. Modify based on updates.
- 5) Generate roles and permissions guidelines for SAGE as deliverable.

Timeline: