

**Team 2**

**Capstone**

**Integrated Project Plan (IPP)**

**Real Estate Education and Marketing Package on Elder Community Needs**

**Team Number:** 2

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**Team Members Name**

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Summary of Changes

**Version Control**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Version Number** | **Week** | **Team Leader Name** | **New Sections Added** | **Changes Made to Previous Sections** |
| 1.0 | 1-2 | Gavin Huang | Scope Analysis, Team Project Schedule | NA |
| 2.0 | 3-4 | Megna Alampalli | Project Scope Statement, WBS | None |
| 3.0 | 5-6 | Aliha Ansari | Cost and Budget Plan, Communication Plan, Ethics Policy | Changes made to scope by adding the children of the elderly in our educational package |
| 4.0 | 7-8 |  |  |  |
| 5.0 | 9-10 |  |  |  |
| 6.0 | 11-12 |  |  |  |

Integrated Project Plan

Project Name: The Elder Real Estate Education and Marketing Project

## Executive Summary

The Elder Real Estate Education and Marketing Project, developed in partnership with real estate expert Tayla Andre, addresses a growing and underserved demographic—older adults navigating complex housing transitions. With rising elder economic insecurity, limited affordable housing options, and the absence of specialized real estate education for aging individuals and their families, this project aims to fill a critical gap. Our background research, including reports from the Massachusetts Executive Office of Elder Affairs and AARP, emphasizes the increasing demand for elder-friendly housing models and the need for trusted guidance in downsizing, protecting assets, and aligning real estate decisions with long-term well-being.

The purpose of the project is to create an integrated education and outreach package that equips Tayla Andre’s brand to better serve elder clients across Massachusetts, and eventually in Georgia and Rhode Island. The project will include customized real estate education content for multiple age groups, a targeted marketing strategy, and community partnership recommendations. The anticipated benefits include strengthening Tayla Andre’s market position as a thought leader in elder housing, increasing access to trustworthy information for aging populations, and promoting equitable and informed housing choices across generations.

## Scope Management

## Scope Statement

* + 1. **Project Scope**

This project seeks to develop and implement an educational real estate initiative for elderly individuals and their families in Massachusetts by **June 28, 2025**. The program aims to equip elderly residents and their children with actionable knowledge on aging-related real estate decisions, including downsizing, rightsizing, preventing fraud, and the creation of living trusts to ensure smooth property transitions. It also seeks to expand the program’s impact through strategic partnerships with elder-focused organizations for broader outreach and implementation.

**Project Objectives and Deliverables:**

* **Deliverable 1:** Develop culturally appropriate educational materials (brochures, flyers, slide decks) that explain real estate needs related to aging, downsizing, rightsizing, asset protection, and fraud prevention — including modules specifically designed for adult children of elderly individuals on living trusts and estate planning.
* **Deliverable 2:** Design and deliver two in-person and one virtual community workshop to educate elderly individuals and their families on the topics above.
* **Deliverable 3:** Create and distribute a digital “Elder Real Estate Readiness Toolkit” including a trust checklist and property planning FAQ.
* **Deliverable 4:** Launch a one-month awareness campaign through local newsletters, housing forums, and email marketing.
* **Deliverable 5:** Propose and initiate at least two strategic partnerships with elder-focused community organizations (e.g., senior centers, health networks) to expand program visibility and engagement.
* **Deliverable 6:** Conduct pre- and post-event surveys to assess knowledge increase and feedback from participants.
  + 1. **Project Milestones**
* Stakeholder and Community Partner Alignment
* Finalization of Educational Materials
* First In-Person Workshop
* Launch of Awareness Campaign
* Completion of Final Community Workshop
* Submission of Final Impact Report
  + 1. **User Acceptance Criteria**

The project will be considered successful if:

* At least 50 community members (seniors and/or their children) attend one or more sessions.
* 75% of attendees report increased understanding of real estate planning and living trusts.
* Final toolkit is published and available through community partners.
* At least two elder-focused partnerships are established.
* All project activities are completed by **June 28, 2025**.
  + 1. **Project Boundaries or Exclusions**
* This project does **not** provide legal or financial services such as drafting wills or trusts.
* Does **not** include direct one-on-one consulting or in-home property assessments.
* No real estate transactions or property sales will be conducted as part of this initiative.
  + 1. **Project Constraints**
* Completion deadline of **June 28, 2025**
* Limited availability of facilitators for in-person workshops
* Target audience may include low-tech populations, limiting digital engagement reach

## WBS

## 2.2.1 Summary of Work Breakdown Structure (WBS)

|  |  |  |
| --- | --- | --- |
| **WBS Code** | **Deliverable (Summary Task)** | **Notes** |
| 1.0 | Planning & Research Phase | Initial setup, stakeholder alignment |
| 2.0 | Educational Materials | Develop brochures, flyers, slide decks |
| 3.0 | Community Workshops | Organize & execute 3 workshops |
| 4.0 | Elder Real Estate Toolkit | Develop & distribute digital toolkit |
| 5.0 | Awareness Campaign | One-month community outreach |
| 6.0 | Strategic Partnerships | Establish partnerships with elder groups |
| 7.0 | Impact Assessment | Conduct surveys, analyze data, final report |

## Schedule and Time Management

## Milestone List

|  |  |  |  |
| --- | --- | --- | --- |
| Milestone Name | WBS | Finish Date | Predecessor |
| Milestone: Educational Materials Finalized | 2.3 | 5/7/2025 | 2.2 |
| Milestone: Workshops Completed | 3.5 | 5/21/2025 | 3.4 |
| Milestone: Toolkit Published | 4.3 | 6/4/2025 | 4.2 |
| Milestone: Campaign Launched | 5.3 | 6/23/2025 | 5.2 |
| Milestone: Partnerships Established | 6.2 | 7/7/2025 | 6.1 |
| Milestone: Final Impact Report Submitted | 7.4 | 7/23/2025 | 7.3 |

## Summary of Schedule

The Elder Real Estate Education & Marketing Project runs from early 2025 until June 28, 2025. The major milestones, according to the Work Breakdown Structure (WBS), include planning and research, educational material development, community workshops, toolkit distribution, a one-month awareness campaign, strategic partnership development, and an impact assessment. Key project milestones and their expected completion dates are as follows:

- Educational Materials Finalized: May 7, 2025

- Workshops Completed: May 21, 2025

- Toolkit Published: June 4, 2025

- Awareness Campaign Launched: June 23, 2025

- Partnerships Established: July 7, 2025

- Final Impact Report Submitted: July 23, 2025

The project is carefully scheduled to ensure each phase builds upon the previous one, maximizing effectiveness and resource utilization. It involves continuous communication among team members, sponsors, and partners.

## Cost and Budget Plan

## Project Cost Statement

The estimated total cost of the project is $18,720. The breakdown of the costs across different deliverables includes:

- Planning & Research: $2,500

- Educational Materials: $3,000

- Community Workshops: $4,500

- Elder Toolkit: $2,000

- Awareness Campaign: $2,500

- Strategic Partnerships: $1,000

- Impact Assessment: $1,500

- Contingency (10%): $1,720

This budget ensures delivery of quality materials, effective community engagement, and robust evaluation practices.

## Communication Plan

The purpose of this communication plan is to ensure timely, effective, and transparent exchange of information between project stakeholders. It defines what will be communicated, who is responsible, the tools used, and the communication frequency throughout the project lifecycle.

**Communication Objectives**

* Keep all stakeholders informed of project status, risks, and changes
* Enable collaboration across a distributed team
* Document and track key decisions and deliverables
* Ensure sponsor expectations are clearly understood and met

**Stakeholders**

|  |  |
| --- | --- |
| **Stakeholder** | **Role** |
| Tayla Andre | Sponsor |
| Rotating Project Manager | Project Coordination |
| Team Members | Execution & Deliverables |
| Faculty Advisor | Oversight & Feedback |

**Communication Tools**

|  |  |
| --- | --- |
| **Tool/Platform** | **Purpose** |
| **Microsoft Teams** | Weekly meetings, document storage, messaging |
| **WhatsApp** | Real-time, informal updates & reminders |
| **Google Drive** | Collaborative document editing and sharing |
| **Zoom** | Sponsor meetings and internal team syncs |
| **Email** | Formal updates, sponsor communication |

**Communication Schedule**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Communication Type** | **Audience** | **Frequency** | **Format/Tool** | **Owner** | **Purpose** |
| Team Standup/Check-in | Team Members | Weekly | Microsoft Teams | Project Manager | Review progress, realign tasks |
| Sponsor Status Updates | Sponsor | Bi-weekly | Email + Zoom | Project Manager | Present progress, gather feedback |
| Internal Task Discussions | Team Members | Daily (as needed) | WhatsApp | All | Quick updates, reminders |
| Deliverable Review | Team Members | Per milestone | Google Drive | Assigned Member | Collaborative editing, commenting |
| Lessons Learned Posts | Course/All Teams | Bi-weekly | Discussion Board | Project Manager | Share best practices and process insights |
| Faculty Feedback | Faculty Advisor | Per submission | Email/Zoom | Project Manager | Review quality, receive academic guidance |

**Information to be Communicated**

* Assignment deadlines and task ownership
* Deliverable updates and review feedback
* Meeting summaries and action items
* Sponsor feedback and direction
* Risk or schedule changes

**Escalation Process**

If issues arise that block progress:

1. Team member notifies the Project Manager.
2. Project Manager addresses with involved members.
3. If unresolved, escalate to the Sponsor or Faculty Advisor.

**Documentation Management**

* All working files and final versions are stored in shared Google Drive folders.
* Comments and edits are tracked using Google Docs version history.
* Meeting notes are documented in a shared team document and saved weekly.

**Communication Plan Review**

The communication plan will be reviewed mid-project and adjusted as needed to ensure continued effectiveness based on team feedback and sponsor needs.

## Ethics Policy Statement

The Elder Real Estate Education & Marketing Project follows a stringent ethics policy aligned with the principles of transparency, respect for privacy, informed consent, and equity in service delivery. Ethical considerations include:

* + No collection or distribution of personal financial or legal data.
  + No real estate sales or financial advice offered.
  + Use of culturally sensitive content to avoid bias.
  + Voluntary participation in workshops and surveys with consent.
  + Prioritizing the dignity and autonomy of elder participants.

Peer-reviewed research supports the importance of ethical practice in community-based programs. For instance, Kaye et al. (2014) emphasizes the ethical responsibility to provide elder populations with accessible, respectful, and empowering education. Similarly, Torres-Gil & Hofland (2012) highlights the need for stakeholder-inclusive planning in elder policy development to avoid paternalism and promote self-determination.

**7.0 Reference**

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**8.0 Appendices**

**8.1 Stakeholder Register: Elder Real Estate Education & Marketing Project**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Stakeholder Position/Role** | **Type of Stakeholder** | **Stakeholder Expectation(s)** | **Stakeholder Interest(s)** | **Influence on Project Result** | **Stakeholder Management Strategies** |
| Tayla Andre (Sponsor) | Internal | High-quality delivery; strategic branding and outreach | High | Supporter | Maintain regular status updates and involve in milestone approvals |
| Rotating Project Manager | Internal | Timely completion, smooth coordination | High | Supporter | Regular team check-ins, priority tracking |
| Team Members | Internal | Task clarity, collaboration, support | Medium | Supporter | Assign clear tasks, open communication via Teams and WhatsApp |
| Faculty Advisor | Internal | Academic rigor, process alignment | Medium | Supporter | Periodic check-ins for feedback and academic review |
| Elder Community Members | External | Accessible, clear, and culturally appropriate information | Low | Neutral | Ensure materials are inclusive; gather feedback via surveys |
| Community Partners | External | Reputation enhancement, effective co-hosting | Medium | Supporter | Engage early, provide toolkits and update |
| Marketing Channels | External | Timely and accurate campaign content | Low | Neutral | Coordinate release schedule and messaging |
| Mass. Elder Affairs & AARP | External | Alignment with elder care guidelines | Low | Neutral | Share final report; ensure policy-sensitive framing |

**8.2 Communication Matrix: Elder Real Estate Education & Marketing Project**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Communication Type** | **Audience** | **Frequency** | **Format/Tool** | **Owner** | **Purpose** |
| Team Standup/Check-in | Team Members | Weekly | Microsoft Teams | Project Manager | Review progress, realign tasks |
| Sponsor Status Updates | Sponsor (Tayla Andre) | Bi-weekly | Email + Zoom | Project Manager | Present progress, gather feedback |
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