

Iteration 1

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System Request

The system request evaluates the opportunity given to create the Kentucky Horsemen's Benevolent and Protection Association's new content management system and the value it is expected to provide. The request addresses the project sponsor, expected business need, business requirements, business value, and the issues and constraints faced.

| Element | Description | Examples |
|-----------------|---|---|
| Project Sponsor | The person who initiates the project and who serves as the primary point of contact for the business side | Sara Tooney, Executive Assistant |
| Business Need | The organization requires a technologically current website that allows them to communicate with members, accept applications, and process payments | <ul style="list-style-type: none">• Increase donations• Improve access to organizational information• Streamline donation process• Streamline membership application process• Streamline benevolence benefit application• Consolidate data• Improve social media integration• Secure sensitive information• Improve operational efficiency• Improve online |

| | | |
|-----------------------|---|--|
| | | <p>engagement</p> <ul style="list-style-type: none"> • Implement online payment process (streamlines revenue sources) • Improved members' online accessibility • Provide member resources online |
| Business Requirements | The business capabilities the system will provide | <ul style="list-style-type: none"> • View information about organization (Board members, about us, mission statement) • Direct contact form • View benevolence benefits • Forms to apply for membership online • Online payment system • Integrated social media feeds (Facebook, Twitter, Instagram) • Calendar management (RSVP to events) • Online form to apply for benevolence benefits • Online form to submit claims • Member data stored in database |

| | | |
|-------------------------------|--|---|
| | | <ul style="list-style-type: none"> • Resource page • Meeting minutes • Media carousel • Legislation page • News archives • External news links • Newsletter archives |
| Business Value | The benefits the system will create for the organization | <ul style="list-style-type: none"> • Process payments online • Submit forms online • Reduce resource use • Increase social media reach • Release more information about KYHBPA to community • Facilitate communication between organization and members via newsletter blasts |
| Special Issues or Constraints | Issues that are relevant to the implementation of the system and decisions made by the committee about the project | <ul style="list-style-type: none"> • Level of technological training required to effectively implement system |

Narrative

The narrative expands on the elements of the system request, including a problem and vision statement describing the issues the current system creates and the vision of the expected solution. The business case expands the business value argument with hard numbers. Feasibility considerations explore technical, economic (cost/benefit), and organizational issues of concern.

Problem Statement

The Kentucky Horsemen's Benevolent and Protection Association (KYHBPA) currently operates on a system with limited capabilities and a lack of data consolidation. This combination prevents the KYHBPA from effectively performing critical business processes. This lag in implementing technological solutions in KYHBPA's operations results in the inability to efficiently process and manage membership and benevolence data and distribute desired information, news, and media to their audience in an accessible manner, resulting in less than desirable community reach. Additionally, the lack of an online payment processing system poses a problem by limiting the avenues in which they can accept donations and fees to mailed-in or dropped off cash and checks.

Introducing a user-friendly and maintainable content management and payment processing system will result in streamlined business activities whilst reducing operating costs and invested time. The implementation of this content management system will also generate the ability to increase the organization's social media and community reach, which may assist in increasing revenues.

Business Case

KYHBPA currently receives \$2,400-\$6,000 a year in memorial donations. Blackbaud's 2015 Charitable Giving Report found online giving has been steadily increasing in recent years, rising 9.2% from 2014 to 2015. There was also a 13% increase in the number of gifts when

online giving was introduced, implying both the number and amount of donations increased. KYHBPA can expect to see a similar trend once a similar online payment system is introduced, therefore increasing annual donations to \$2,712-\$6,780 (conservative estimate) at a minimum. This number could grow depending on KYHBPA's marketing strategy.

Additionally, migrating the quarterly newsletter, membership applications, benevolence applications, and other requests to an online submission form generates the ability to reduce overall resource usage. The National HBPA mails quarterly newsletters on the KYHBPA's behalf. This service costs KYHBPA \$6,000 a year, all of which could be eliminated by transitioning the newsletter to a quarterly newsletter email blast to their membership base.

These resource savings apply to general paper use as well. With a 10 ream box of paper averaging \$60, each office worker utilizing about 5,000 sheets of paper per year (as a conservative estimate), and each of the 6,000 members using 20 sheets of paper for various application forms and reports, the KYHBPA spends approximately \$1,560 annually, just on paper. Overall, if forms and the newsletter were migrated onto a digital platform, these costs would be reduced by at least \$6,500 depending on how paper-dependent KYHBPA intends to stay. These savings also tie into ink costs, which vary depending on the model of Canon printer.

KYHBPA budgets \$30,000 to update their current website through Blue Million. Implementing the new content management system via a free, open-source platform such as WordPress can mitigate this cost. The main costs associated with using an open-source platform are the domain, which is \$10 annually to own, and the hosting fee, which averages \$120 annually. Additionally, if an online payment service such as PayPal were implemented into the website, there would be nominal processing costs associated with the service. For example, PayPal charges 2.2% plus \$0.30 per transaction processed. For example, if memorial donations were taken online and each donation averaged about \$100, annual payment process fees would equal \$19.32. This would bring total maintenance and operations costs to \$149.32 annually, generating savings of \$29,850.68 on system operations and maintenance alone.

The implementation of the proposed system generates an overall revenue increase of \$312 - \$780 and an overall expense decrease of \$36,350.68. These are conservative estimates; overall savings and revenue increases can be much greater.

Feasibility Considerations

There are four concerns with the technical feasibility of the system, including familiarity with the functional areas, familiarity with the technology, the project size, and compatibility. The technical risk analysis has revealed the following:

- Familiarity with functional areas
 - The organization is familiar with their organizational functionalities. However, they are unfamiliar with the new system that will be implemented. The analysts have been well informed in the business processes and functional areas of the organization and are familiar with the new system that will be implemented.
- Familiarity with the technology
 - The organization is unfamiliar the technology that will be used for the new system, increasing the potential for problems and delays. However, with training, the technology will be relatively straightforward and user-friendly.
- Project size
 - The new system will be a complete overhaul of the old system, only keeping key features and adding in additional features that will assist in business processes. Old organizational data can be seamlessly integrated into the new system. The group sizes are to be kept to 4-5 people, maintaining close contact and communication between all members.
- Compatibility
 - The new system can easily integrate all old organizational data. Since the old system had very basic functionality, it will not be difficult to build on the functionality of the old system to create a new system that is more comprehensive, effective, and efficient in performing all necessary business processes.

The financial feasibility of the project has been outlined below in a cost-benefit analysis:

- Costs
 - Total maintenance and operations cost - \$149.32 annually (outlined in the Business Case)

- Time will be required to train employees and volunteers to become comfortable with the system
- Potential for rejection from audience base because they are not tech-savvy
- Benefits
 - Reduction in cost because resources are being used efficiently
 - Migrating paperwork online reduces overall office supply costs
 - Better communication with members
 - Increased internet presence combined with general marketing through social media and word-of-mouth leads to greater reach, creating the potential to:
 - Increase donations
 - Increase members
 - Increase volunteers
 - Increase political reach
 - Security in storing membership information in database, data consolidation
 - Ensures business continuity in the event of natural disaster or theft
 - Reduces likelihood of legal issues if data is physically compromised
 - Information accessible remotely
 - Online payment processing

Organizational feasibility addresses how well the system will ultimately be accepted by its users and incorporated into the ongoing operations of the organization. These considerations have been outlined below:

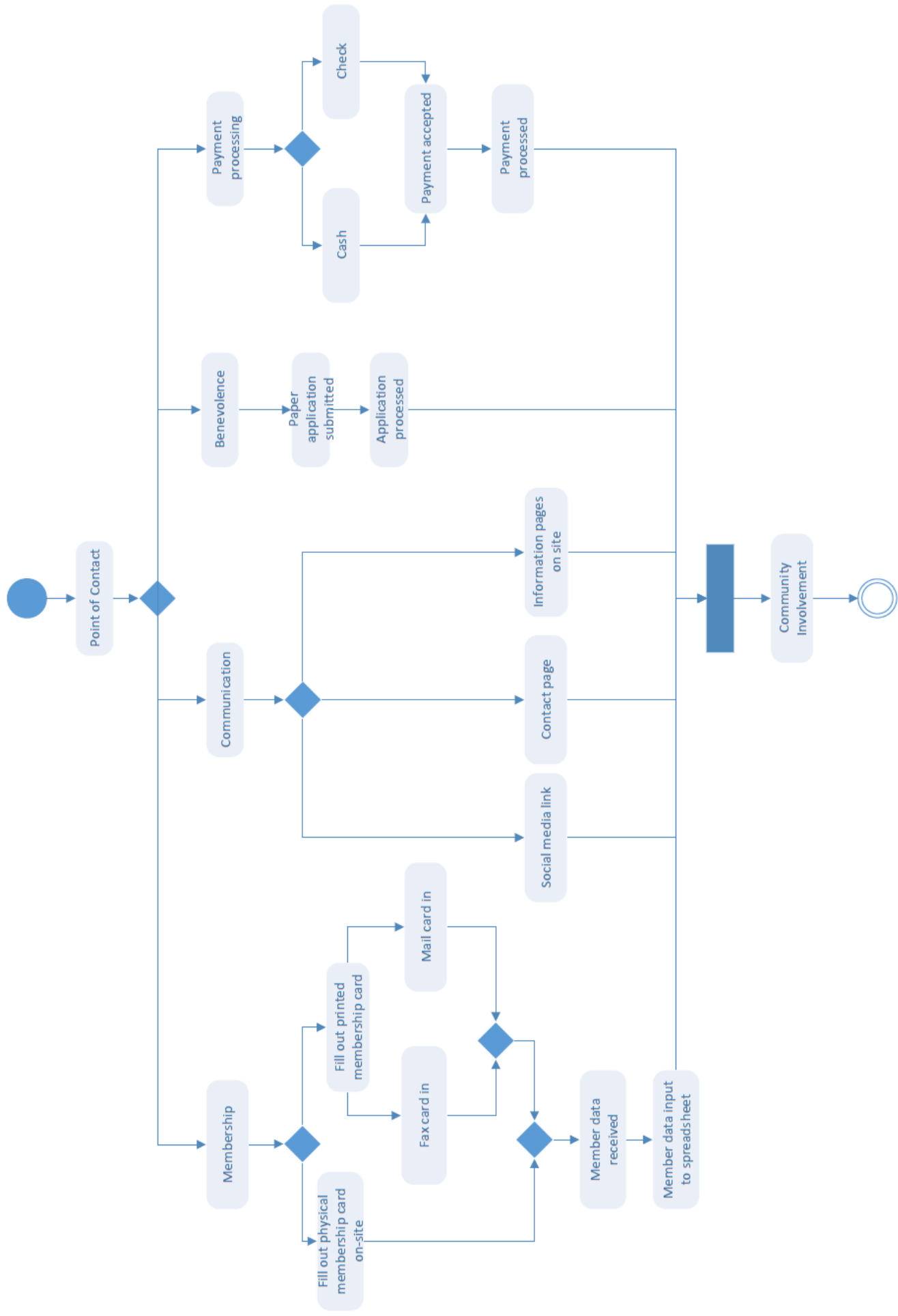
- A comprehensive training program aimed at familiarizing employees and volunteers with the system will alleviate discomfort with the dramatic transition
 - Ensure training program includes:
 - How to update and manage the website
 - How to update and manage website content
 - How to update social media feeds through widget
 - How to integrate and update document forms on website as needed
 - How to pull information from submitted forms

- The new system will assist in making business processes more efficient
 - All member contact information will be consolidated online
 - Send newsletter blasts with the click of a button
 - Send updates or important information with the click of a button
 - All application processes moved online
 - All information consolidated in one place
 - Easier to process each application
 - Ability to include different parties in different processing areas (E.G insurance, doctors for approving certain requests)
 - View engagement statistics and adjust approaches accordingly
 - Poll membership base to see their opinions
 - Reaches out to a fresh, broader audience
 - Tech-savvy, younger generation
 - Out-of-state parties interested in organization
- Since most business operations have become integrated with technology, this transformation will not be as shocking

Process Models

As-is Process Model

The “as-is” process model describes the system as it is currently. KYHBPA currently uses the homepage as a primary point of contact. A user then has the choice between four business processes: membership, communication, benevolence, and payment processing. However, benevolence and payment processing are not supported on the website. The primary features the system currently offers are instructions on how an interested party can apply for membership and brief communication avenues where an interested party can link to KYHBPA’s Facebook, see KYHBPA’s contact information, and see brief bits of information about the organization. With KYHBPA’s benevolence activities, the majority of the process is done on paper. KYHBPA processes payments via mail-in or dropped-off checks and cash.



To-be Process Model

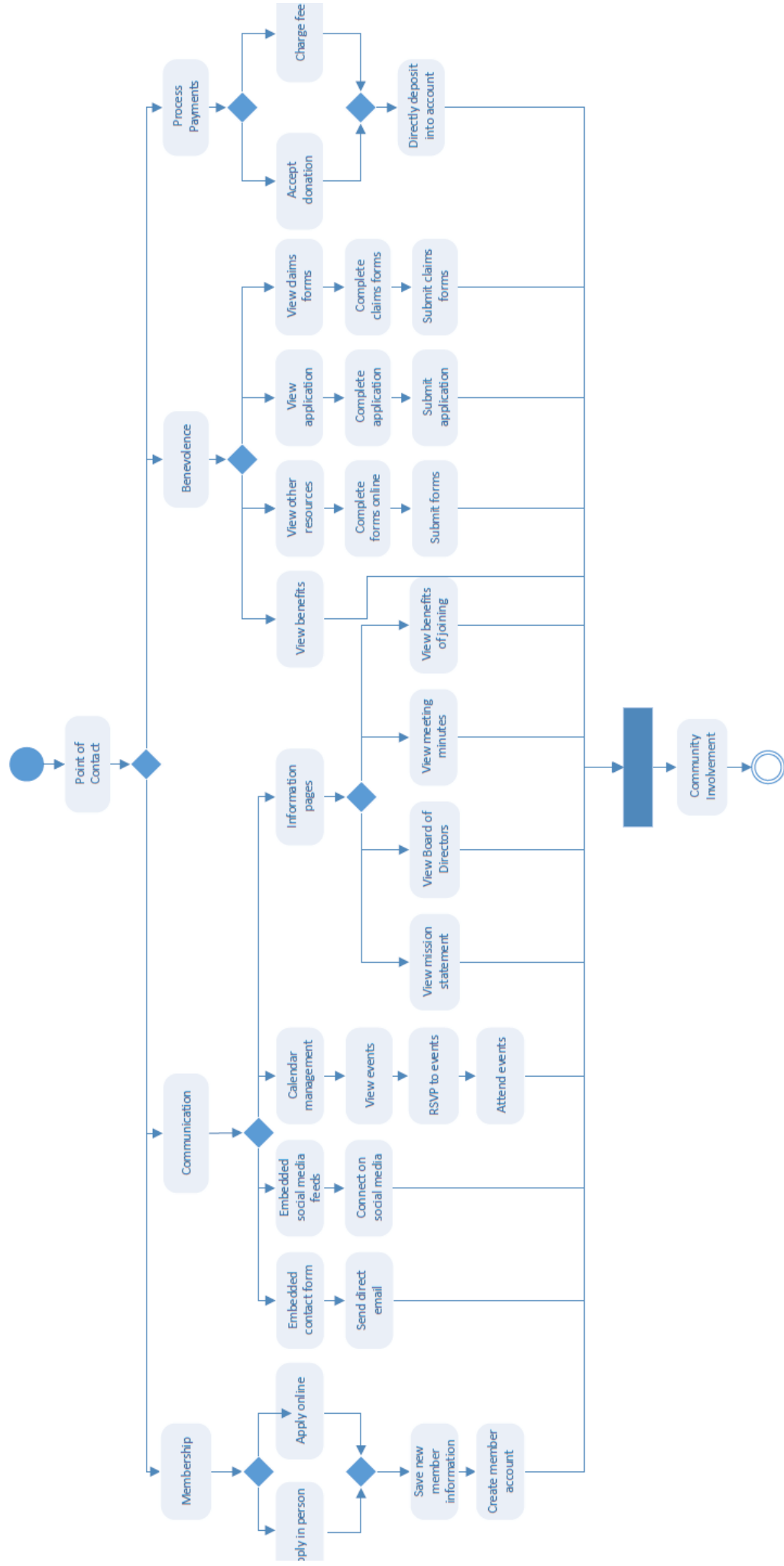
The “to-be” process model depicts the system as it is envisioned. KYHBPA still maintains the homepage as the primary point of contact and the decision between the four main business processes remains the same. However, each process is significantly more detailed.

Starting from the membership business process, interested parties can decide to apply in-person or submit an application online. The system can then save the new member information and create a member account where the interested party can access their submitted applications and view their progress and explore other information members could benefit from.

Moving to the communication business process, interested parties can choose to send a direct email to KYHBPA via an embedded contact form. Additionally, embedded social media feeds allow visitors to see the KYHBPA’s latest activity and connect with KYHBPA on various social media platforms. The new system also includes a more detailed calendar management system which allows visitors to view and RSVP to events, which in turn provides a guest list to KYHBPA. The information pages will be more fleshed out with a mission statement, interactive Board of Directors page, meeting minutes directory, and a comprehensive guide of benefits members will receive upon joining the KYHBPA.

The benevolence business process is the most fleshed out process in the new system. The new system provides members the ability to view the various benefits the program offers, view and submit other resources, view and submit applications, and view and submit claims forms. This encompasses the entirety of the benevolence application process and migrates it to an online platform.

The payment process will also be migrated online, although it is assumed donations will still be accepted in-person. With the new system, KYHBPA will be able to accept donations and fees that will be directly deposited into their account after the processing fee is subtracted.



Vision Document

1. Introduction

The purpose of this document is to collect, analyze, and define high-level needs and features of the KYHBPA content management system. It focuses on the capabilities needed by the stakeholders and the target users, and why these needs exist. The details of how the KYHBPA content management system fulfills these needs are detailed in the use-case and supplementary specifications.

1.1 References

2. Positioning

2.1 Problem Statement

| | |
|--------------------------------|--|
| The problem of | <ul style="list-style-type: none">• Outdated system• Lackluster website• Lacking functionality• Inability to perform critical business processes online• Lack of business continuity – business will not continue if the paper system were compromised, there is a need to transfer critical information online |
| affects | <ul style="list-style-type: none">• Members• National HBPA• Employees• Potential donors• Interested parties |
| the impact of which is | <ul style="list-style-type: none">• Not engaging for site visitors• Inability to process payments/donations online• Inability to complete forms online• Cannot register for membership on website• Lack of information about the organization• Overspending on website maintenance for poor results (\$30,000 annually) |
| a successful solution would be | <ul style="list-style-type: none">• Improved engagement from visitors• Improved marketability |

| | |
|--|--|
| | <ul style="list-style-type: none"> • Reduce operational costs • Increase donations • Increase benevolence services requested • Increased community and industry awareness about organization • Increased community and industry awareness about relevant issues |
|--|--|

2.2 Product Position Statement

| | |
|--------------------|--|
| For | KYHBPA |
| Who | Requires a comprehensive content management system that is user-friendly and supports desired business processes |
| The (product name) | Is a software product |
| That | Is user-friendly and integrates seamlessly with social media platforms. Additionally, it should effectively market their cause to potential members and donors and allow KYHBPA to transfer critical business processes to an online platform. |
| Unlike | For-hire website designers |

3. Stakeholder and User Descriptions

3.1 Stakeholder Summary

| Name | Description | Responsibilities |
|--------------------|--|--|
| Organization | End user | Provide requirements of new system Provide additional information required to transition organization to become more online-based Provides domain and host for desired website |
| System Analyst | Integrates the needs of the organization with the capabilities of technology | Ensures the system meets the organization's desires and maintains the system |
| Software Architect | Responsible for creating system | Create system in manner that is user-friendly and intuitive Ensure system is capable of performing desired business processes |

3.2 User Summary

| Name | Description | Responsibilities | Stakeholder |
|--------------|--|---|---|
| Organization | Create and push the content the website will house | <ul style="list-style-type: none">• Produce information required on website to process applications• Maintain training to keep employees informed as to how to use the website• Keep website's content up-to-date• Ensure submitted applications and requests are being processed in a | Sarah Tooney, Jenny Rees, KYHBPA volunteers |

| | | | |
|--|--|--|--|
| | | timely fashion <ul style="list-style-type: none"> • Ensure software is up to date | |
|--|--|--|--|

3.3 User Environment

The users interacting on the management side of the system are Sara Tooney and Jennie Rees. The users interacting with the front end of the system are members, donors, and interested parties. The website should also be optimized for mobile use and able to accessed via any operating system.

3.4 Summary of Key Stakeholder or User Needs

| Need | Priority | Concerns | Current Solution | Proposed Solutions |
|---------------------------|----------|---|-------------------------------------|---|
| Secure member information | High | Manage private information | Excel spreadsheet | Manage member information via database on cloud server |
| Process payments online | High | None | In-person/mailed-in checks and cash | Payment processing system (E.G. Paypal) |
| User-friendly | High | May be a learning curve for both administrators and users | None | Create training program and manual on the system for the administrators |

3.5 Alternatives and Competition

KYHBPA can hire an external website developer to provide this service and required updates. While this option puts all of the website concerns on a capable third-party, it brings a hefty cost along with it which would increase costs. Additionally, there is potential problem that the developer doesn't understand the business needs of KYHBPA, therefore producing a product that is not optimally suited for KYHBPA.

4. Product Overview

4.1 Product Perspective

This product is completely independent and self-contained. There currently do not appear to be more systems implemented in the organization.

4.2 Assumptions and Dependencies

- Content management system is accessible on all operating systems
- Content management system can run on mobile and older devices
- The system has an Internet connection to connect to
- The system can be altered to be more user-friendly
- The administrators will be adequately trained to use the system effectively

5. Product Features

- Ability to apply for membership online
- Ability to send email directly to KYHBPA via embedded contact form
- Embedded social media feeds
- Calendar management system that allows users to view and RSVP to events
- Mission statement page
- Detailed Board of Directors page
- Meeting minutes page
- Benefits of joining KYHBPA page
- Benevolence benefits available page
- Ability to apply for benevolence benefits online
- Ability to request reports online
- Ability to pay fees online
- Ability to donate online
- Content editors (WYSIWYG, i.e. what you see is what you get)
- Security (firewalls, ID verification, security certificate)
- Add and edit pages
- Spell check
- File uploading
- File downloading

6. Other Product Requirements

The basic requirements for this system are an Internet connection and relatively updated laptop that is capable of handling Internet processing. The system also has to be capable of handling a moderate traffic load.

Agile Stories

Agile stories are a simple description of a product requirement in terms of what the requirement must accomplish for the users of the system. The four types of users described in these stories are: potential members, current members, racing enthusiast and a donor.

ID: AS1

Title: Apply for membership online

As: A potential new member of KYHBPA

I want to: Apply for membership online without having to mail in an application

So that: I wish to remain environmentally conscious, receive benefits associated with the KYHBPA, and contribute to the KYHBPA.

Value and effort estimate: Waste management and being environmentally conscious are things every company should be well aware of. The implementation of an online membership application process would greatly assist KYHBA, a largely paper-based organization, in both areas. Additionally, an online membership process encourages more enthusiasts and supporters to join, particularly those unable to mail or drop off the membership card.

ID: AS2

Title: Submit claims and benevolence benefit application forms online

As: A member of HBPA (trainer, owner)

I want to: Fill out and submit claims and other applications online, view my claim and application status, and receive feedback concerning my application in one place instead of submitting multiple paper forms

So that: I can fill out forms on-the-go, trackside, or as I need to at my convenience

Value and effort estimate: Implementing online form submissions for benevolence benefits and claims allows for more members to take advantage of the benefits KYHBPA provides. A trainer, owner, or worker can submit claims and applications remotely if necessary, and these forms

can be submitted track-side in case an injury happens during a training session in order to expedite the services KYHBPA offers

ID: AS3

Title: Seeking information about who KYHBPA is

As: A racing enthusiast

I want to: Learn more about the KYHBPA

So that: I can get involved or donate because I support the cause

Value and effort estimate: Giving passionate community members the ability to get involved usually leads to spreading the word about the organization and getting more people involved. KYHBPA gaining more volunteers allows it to better pursue and perform activities that support the platform the KYHBPA was built on. Community members want to contribute to organizations they know about, so creating extensive information pages that allow the curious to read about the Board of Directors and their stake in the industry, the history of the HBPA, what the HBPA does, is important. Creating these pages in an engaging, intuitive, and user-friendly way ensures those who are interested remain on the page and do not become discouraged while trying to navigate a site.

ID: AS4

Title: Support the organization

As: A donor

I want to: Donate to the KYHBPA

So that: I contribute to the activities KYHBPA performs for the industry and its workers and allow the KYHBPA to do more activities in the community and spread awareness about the industry.

Value and effort estimate: Supporting the KYHBPA monetarily allows it to produce programs and activities that add value to its members. Adding a user-friendly donation area will encourage interested donors to donate due to sheer ease of use. In the modern, technological age, it is simply easier to donate online or via mobile phones rather than mail a check or cash.

Team Charter

The team charter describes how the team will conduct its activities as a unit. It describes the team goals, team meetings, team communications, team decisions, and project repository.

Team Goals

The team's goal is to successfully combine our knowledge to propose a content management system that satisfies KYHBPA's business needs. The system must also be practical and cost-effective. The new system should facilitate communication, membership application processes, benevolence application processes, and payment processing.

Team Meetings

Team meetings will take place Tuesdays and Thursdays during allotted class times and during the weekends as needed. Team meetings outside of class will be scheduled based on when team members will be available. Meeting decisions will be documented via a message in the team GroupMe.

Team Communications

The majority of group communication outside of class will be facilitated using GroupMe. The work done will be stored on Google Drive, which includes a chat feature to facilitate collaboration while working on documents. Big decisions among members will be made during class meetings. Decisions between the team and client and team and instructor will be made via email.

Team Decisions

The team will build consensus by examining all ideas team members have and weighing the pros and cons of each idea. Discussions will be open, where all members are free to state their opinion without immediate backlash. All conflicts will be resolved respectfully. If a consensus cannot be reached through discussion, a vote will be determined.

Project Repository

All project documentation will be stored on Google Drive, mainly utilizing Google Docs. Google Docs features all members of the team to make changes and view the document. It also enables the tracking of changes made to the document and enables multiple members to work on the same document at the same time and communicate in the chat. Ideas that members wish to share are stored in a main “Idea Dump” document that will be regularly addressed.