# Project Plan Document

BUS4 119A - Group 4
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# Project Overview

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Santa Cruz Volunteer Center (SCVC) is a nonprofit organization committed to strengthening community engagement by connecting volunteers and donors with positive social impact programs. Currently, the organization relies on DonorPerfect, a donor management platform, to track donor information and record contributions received through online, in-person, and fundraising event payments.

The organization faces challenges with integrations such as Salesforce Hands-On, improving donor engagement, and difficulties in program and campaign reporting. The donor database covers basic information but does not include an in-depth overview of donors. Detailed information about donors is vital in personalizing communications. DonorPerfect is slightly outdated in donor information and needs improvements in generating reports for different programs and campaigns. The goal is to easily view donor information and understand optimal outreach periods while improving reporting capabilities.

This project aims to enhance SCVC's donor engagement strategy by evaluating and modernizing its donor platform capabilities. The team will comprehensively assess alternative donor management platforms while exploring the potential to optimize DonorPerfect. To efficiently address both pathways, the team will divide into two focus groups: one dedicated to researching alternative platforms and the other to investigating DonorPerfect.

By the end of this project, SCVC will receive a clear set of platform recommendations and steps designed to improve donor data tracking, personalize outreach, streamline program reporting, and ultimately, strengthen donor relationships and fundraising outcomes.

# Feasibility Assessment and Contingency Plans -

## *Economic Feasibility*

This project may involve  costs, especially if SCVC transitions to an enterprise-level donor platform. Licensing fees, implementation, and training could require a significant investment. However, these costs may be justified over time through improved donor engagement, better reporting capabilities, and increased fundraising efficiency.

## *Technical Feasibility*

Technically, the project is feasible since SCVC is already on DonorPerfect and accustomed to online solutions. Migration of data and integration with new platforms is generally easy. Staff training and vendor support will ensure smooth implementation or optimization.

## *Operational Feasibility*

The project is operationally feasible because the Santa Cruz Volunteer Center already uses online tools like DonorPerfect and has a team familiar with digital platforms. Staff are open to improving their current system or moving to a better one. The new platform (or improved DonorPerfect) will help them manage donor and volunteer information more easily, personalize communication, and track engagement. It will also make it easier for the staff to thank supporters and plan outreach, which supports their mission.

## *Organizational Feasibility*

The organization's objectives of increasing community involvement and enhancing engagement are well served by this project. Better technology is obviously needed to manage data and reporting, and the leadership team is in favor of the improvements. This initiative fits the organization's resources and speed because it focuses on study and recommendations rather than full adoption. When the organization is ready, it can proceed with the recommendations that have been made.

# Project Procedures

**Mode of Contact:** The primary mode of contact with the client, Leslie Lee, will be through email and Zoom meetings.

**Team's Focal Point:** The team's focal point involves project deliverables, status reports, and divided tasks to complete deliverables on time according to the Gantt chart and timeline.

**Frequency of Email Updates to Client:** Email updates are given to the client every 2 weeks throughout the project.

**Frequency of Team Meetings:** Team meetings happen during class time every Tuesday and Thursday from 10:30 am - 11:45 am. During the meetings, tasks and deliverables that need to be done are discussed.

**Mode of Interaction/Discussion During Team Meetings:** Team meetings happen in person and sometimes online. Open discussion and effective communication are achieved in the meetings. Group text messages also happen every day throughout the project.

**Format of Project Status Reports:** Each status report highlights the tasks done each week and what was accomplished based on the Gantt chart.

**Formats of the End-User Documentation/Manual:** A presentation will be provided to the sponsor with all recommendations and resources needed to make a decision.

# Project Resources

| Resource Name | Role | Contact Information |
|---|---|---|
| Leslie Lee | Project Sponsor | leslie.lee@scvolunteercenter.org |
| Ramamurti Sridar | Project Advisor | ramamurti.sridar@sjsu.edu |
| Reenam Kaur | Project Manager | reenam.kaur@sjsu.edu |
| Adriane Nguyen | Technical Lead | adriane.nguyen@sjsu.edu |
| Selam Ketema | Research Consultant | selamawit.ketema@sjsu.edu |
| Varshita Kalakota | Research Consultant | varshita.kalakota@sjsu.edu |
| Kareena Sobti | Research Consultant | kareena.sobti@sjsu.edu |
| Saijal Sobti | Research Consultant | saijal.sobti@sjsu.edu |

# Project Schedule

| ID | Task Name | Duration (days) | Start | Finish | Predecessor By ID # | Resource Names | % Completed | Date Completed |
|---|---|---|---|---|---|---|---|---|
| 1 | **SANTA CRUZ VOLUNTEER CENTER PROJECT INITIATION** | **56 days** | **March 5, 2025** | **April 24, 2025** | | | 20% | |
| 2 | **Develop Project Charter** | **14 days** | **March 5, 2025** | **March 19, 2025** | | **Adriane, Varshita, Kareena, Saijal, Selar** | 100% | |
| 3 | Set up meeting with project sponsor | 1 days | March 6, 2025 | March 7 | - | Reenam | 100% | March 7 |
| 4 | Obtain information from project sponsor | 1 day | March 7, 2025 | March 10 | 3 | Adriane, Varshita, Kareena, Saijal, Selam, | 100% | March 7 |
| 5 | Organize information into charter/gantt chart | 3 days | March 10, 2025 | March 14 | 4 | Adriane, Varshita, Kareena, Saijal, Selam, | 100% | March 13 |
| 6 | Finalize project charter | 4 days | March 14, 2025 | March 17 | 5 | Adriane, Varshita, Kareena, Saijal, Selam, | 100% | March 17 |
| 7 | Submit project charter | 3 days | March 17, 2025 | March 18 | 6 | Reenam | 100% | March 17 |
| 8 | Project sponsor reviews project charter | 1 days | March 18, 2025 | March 19 | 7 | Adriane, Varshita, Kareena, Saijal, Selam, Reenam | | |
| 9 | Project charter approved | 1 days | March 19, 2025 | March 19 | 8 | - | | |
| 10 | **SPRINT 1: Assess Current System & Identify Gaps** | **14 days** | **Thursday, March 20, 2** | **April 3** | 9 | **Adriane, Varshita, Kareena, Saijal, Selam, Reenam** | | |
| 11 | Review Existing System Documentation | 2 days | March 22 | March 24 | 10 | Adriane, Varshita, Kareena | 100% | March 24 |
| 12 | Analyze integration with external platforms (e.g., Salesforce) | 2 days | March 24 | March 26 | 11 | Adriane, Varshita, Kareena | 80% | |
| 13 | Evaluate existing reporting capabilities and limitations | 2 days | March 26 | March 28 | 12 | Adriane, Varshita, Kareena | 80% | |
| 14 | List technical constraints affecting system performance | 2 days | March 28 | March 31 | 13 | Adriane, Varshita, Kareena | 80% | |
| 15 | Identify user experience and usability challenges | 3 days | March 31 | April 2 | 14 | Adriane, Varshita, Kareena | 80% | |
| 16 | Collect requirements for improvements and new features | 2 day | April 2 | April 3 | 15 | Adriane, Varshita, Kareena | 80% | |
| 17 | Summarize key issues and propose potential solutions | 1 day | April 3 | April 3 | | | | |
| 18 | **SPRINT 2: Research New CRM/Donor Management Platforms** | **9 days** | **Friday, April 4, 2025** | **April 13** | 16 | **Adriane, Varshita, Kareena, Saijal, Selam, Reenam** | | |
| 19 | Research existing donor management platforms | 1 day | April 5 | April 6 | 17 | Saijal, Selam, Reenam | 100% | |
| 20 | Compare features, pricing, and integration capabilities | 1 day | April 6 | April 7 | 18 | Saijal, Selam, Reenam | 100% | |
| 21 | Assess Compatibility with Existing System | 1 day | April 7 | April 8 | 19 | Saijal, Selam, Reenam | 70% | |
| 22 | Conduct Vendor Demos & Gather Feedback | 1 day | April 8 | April 9 | 20 | Saijal, Selam, Reenam | 70% | |
| 23 | List essential vs. nice-to-have features based on organizational needs | 1 day | April 9 | April 10 | 21 | Saijal, Selam, Reenam | 70% | |
| 24 | Compare total cost of ownership (TCO) for each solution | 1 day | April 10 | April 12 | 22 | Saijal, Selam, Reenam | 70% | |
| 25 | Shortlist 2-3 CRM solutions for deeper technical evaluation | 2 days | April 12 | April 13 | 23 | Saijal, Selam, Reenam | 70% | |
| 26 | Summarize research findings and vendor assessments | 1 day | April 13 | April 13 | 24 | - | | |
| 27 | **SPRINT 3: Provide Final Recommendation on CRM Selection** | **10 days** | **Monday, April 14, 202** | **April 24** | 25 | **Adriane, Varshita, Kareena, Saijal, Selam, Reenam** | | |
| 28 | Evaluate Shortlisted CRM Platforms | 3 days | April 17 | April 18 | 26 | Adriane, Varshita, Kareena, Saijal, Selam, Reenam | | |
| 29 | Conduct Data Migration Feasibility Study | 1 days | April 18 | April 20 | 27 | Adriane, Varshita, Kareena, Saijal, Selam, Reenam | | |
| 30 | Develop Implementation Roadmap | 2 days | April 20 | April 21 | 28 | Adriane, Varshita, Kareena, Saijal, Selam, Reenam | | |
| 31 | Gather Stakeholder Feedback on CRM Options | 1 day | April 21 | April 23 | 29 | Adriane, Varshita, Kareena, Saijal, Selam, Reenam | | |
| 32 | Finalize CRM Selection & Approval Process | 2 days | April 23 | April 24 | 30 | Adriane, Varshita, Kareena, Saijal, Selam, Reenam | | |
| 33 | Prepare Final Recommendation Report | 1 day | April 24 | April 24 | 31 | Adriane, Varshita, Kareena, Saijal, Selam, Reenam | | |

# Appendix

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*Copy of Signed Project Charter*

**Project Background:**
The Santa Cruz Volunteer Center (SCVC) aims to enhance its donor and volunteer engagement through utilizing a modernized donor platform. Their current platform DonorPerfect includes a donor database with information about donors and records their donations. The organization accepts donations through various methods such as online or physical payments at fundraising events and the volunteer center. Currently, the organization faces challenges with integrations such as Salesforce Hands-On, improving donor engagement, and difficulties in program and campaign reporting. The donor database covers basic information but does not include an in-depth overview of donors. Detailed information of donors is vital in personalizing communications. DonorPerfect is slightly outdated in donor information and needs improvements in generating reports for different programs and campaigns. The goal is to easily view donor information and understand optimal outreach periods while improving reporting capabilities.

To address these challenges, our team will focus on researching alternative donor platforms while investigating the prospect of keeping DonorPerfect. The team will split into two focus teams: one to research platform options and the other to investigate DonorPerfect. By the end of the project, we hope to improve the SCVC's outreach initiatives to better engage with donors.

**Project Scope**

- Review capabilities of DonorPerfect and identify areas for use (ex. Unused function that would greatly benefit the organization)
- Research and recommend donor management platforms
- Develop improved donor and volunteer engagement systems
- Enhance reporting capabilities for better program insights
- Evaluate and select a new Donation Platform/CRM for improved functionality

**Functional Scope**
- Research, evaluate, and recommend a new Donation Platform/CRM that meets the organization's requirements
- Establish an improved donor engagement process that includes personalized outreach and recognition
- Implement a strategy for tracking and engaging volunteers similarly to donors.
- Ease in thanking donors and volunteers

- Create detailed donor and volunteer profiles that include historical contributions and engagement levels
- Increased integration capabilities (ex. Salesforce Hands-On)
- Automate data synchronization to ensure donor records are updated across platforms

**Nonfunctional Scope**
- Optimize data transfer between different platforms
- Ensure the new platform is user-friendly and accessible to relevant staff
- Provide necessary training and documentation for staff
- Ensure the new Donation Platform/CRM aligns with organizational goals and is scalable
- Attentive customer support to troubleshoot questions for the new system

**Data Scope**
- Maintain comprehensive donor records, including contact details, donation history, and preferences
- Capture and track volunteer information, including participation history and roles
- Enable real-time updates across all platforms to ensure data consistency
- Implement reporting features that effectively analyze donation trends and growth periods

**Project Constraints:**
- Limited compatibility between DonorPerfect and other integrations like Salesforce Hands-On
- Limited time until project completion
- Ensuring secure data transfer and integration between DonorPerfect and the new platform
- Selection of a new Donation Platform/CRM within budget and organizational needs

**Project Assumption:**
- A more effective and easily accessible platform exists to use, or DonorPerfect can be optimized to meet SCVC's needs
- Donor and volunteer data can be successfully migrated and maintained within the new platform without significant losses of the data
- The organization has the necessary resources to implement the proposed solutions within the timeline

**Milestone:**
- Assess current integration issues and identify solutions (03/24/25)
- Research New CRM/Donor Management Platforms (04/14/25)
- Identify enhanced reporting capabilities for donor and volunteer engagement insights within DonorPerfect (04/24/25)
- Evaluate potential new Donation Platform/CRM options (04/24/25)

- Present findings to sponsor about recommendation of new Donation Platform/CRM (05/05/25)

**Project Team Approval: Team 4,** 03/16/2025
**Project Sponsor:** Leslie Lee
**Project Manager:** Reenam Kaur
**End User Lead:**

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**Leslie Lee** <leslie.lee@scvolunteercenter.org>                    Wed, Mar 26, 2:06 PM    ☆    ↩    ⋮
to Selam, Adriane, Saijal, Kareena, me, Reenamjot ▾

Apologies for the delay! I missed this email.

Looks good however I would remove  goals related to actually adopting a system:

- Conduct testing and validation of the updated system (05/30/25)
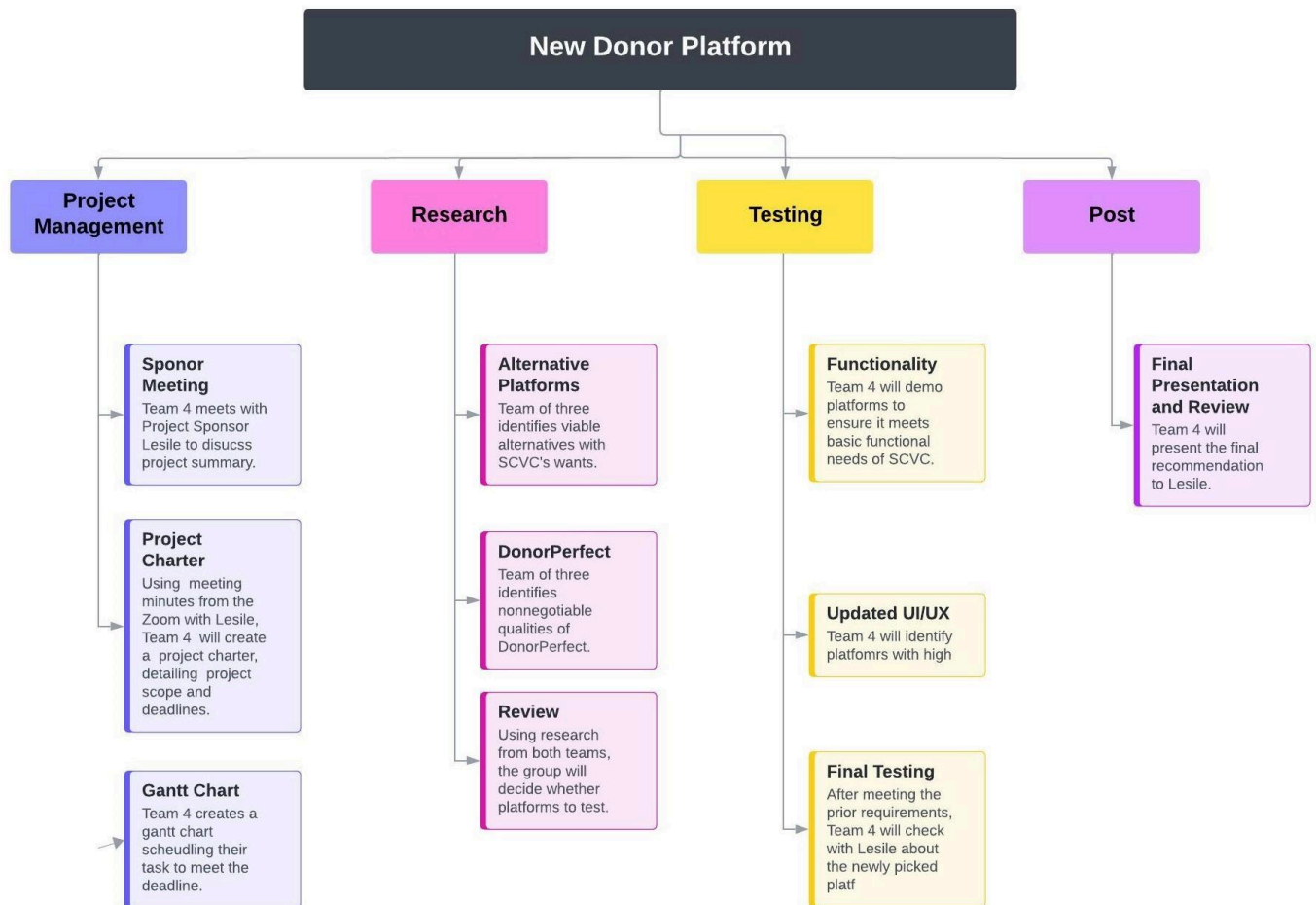- Deploy the new Donation Platforms/CRM and train staff on new functionalities (05/14/25)

We simply won't have time for that as I'll need to present the findings and recommendations to my team and the soonest that would be is late may early June due our internal calendar, and specifically, big events and leadership vacations etc. We don't move that fast!

My thought was that your recommendations and presentation on which platforms and why would be enough for this phase. Let me know your thoughts and if that will work for your educational goals as well. Thanks!

**Leslie Lee**
*Director of Community Engagement*
Volunteer Center of Santa Cruz County
831-427-5070 x123 | 831-535-8388 (cell)

*Your gift powers connection & hope across Santa Cruz County.*
**Please donate today!**

# *Work Breakdown Structure*



**New Donor Platform**

**Project Management**

- **Sponor Meeting**
  Team 4 meets with Project Sponsor Lesile to disucss project summary.

- **Project Charter**
  Using meeting minutes from the Zoom with Lesile, Team 4 will create a project charter, detailing project scope and deadlines.

- **Gantt Chart**
  Team 4 creates a gantt chart scheudling their task to meet the deadline.

**Research**

- **Alternative Platforms**
  Team of three identifies viable alternatives with SCVC's wants.

- **DonorPerfect**
  Team of three identifies nonnegotiable qualities of DonorPerfect.

- **Review**
  Using research from both teams, the group will decide whether platforms to test.

**Testing**

- **Functionality**
  Team 4 will demo platforms to ensure it meets basic functional needs of SCVC.

- **Updated UI/UX**
  Team 4 will identify platfomrs with high

- **Final Testing**
  After meeting the prior requirements, Team 4 will check with Lesile about the newly picked platf

**Post**

- **Final Presentation and Review**
  Team 4 will present the final recommendation to Lesile.

## Risk Matrix

The project aims to assess and improve donor engagement by evaluating SCVC's current donor management system, DonorPerfect, and providing a recommendation for an alternative platform that better supports the organization's engagement and reporting needs. While implementation and training are outside the scope of this project, several risks may still impact the quality and timeliness of our research and final recommendation. These include limited platform compatibility, unclear stakeholder expectations, time constraints, and platform-related uncertainties. The table below outlines key risks, their impact, probability, and mitigation strategies.

| # | Risks | Impact | Probability | Mitigation |
|---|-------|--------|-------------|------------|
| 1 | Recommending an Incompatible Platform | 30% | Medium | Review SCVC's existing tools and prioritize platforms with proven integration (e.g., Salesforce Hands-On). |
| 2 | Limited Access to Stakeholder Feedback | 30% | Medium | Maintain consistent communication with SCVC and ask targeted questions during check-ins. |
| 3 | Time Constraints | 40% | High | Follow the Gantt chart closely and hold team members accountable for research milestones. |
| 4 | Overlooking Critical Evaluation Criteria | 35% | Medium | Use a weighted scoring matrix to ensure fair and thorough evaluation of each platform. |
| 5 | Scope Creep | 30% | Medium | Stick to the approved scope—focus only on research and recommendation, not implementation or support. |
| 6 | Platform Vendor Lock-In Risks Not Identified | 20% | Low | Compare terms of service and contracts of top platform options during evaluation. |
| 7 | Overwhelming the Client with Too Many Options | 10% | Low | Shortlist only the top 2–3 options with pros and cons and a clear recommendation. |

*Information Architecture Diagram*
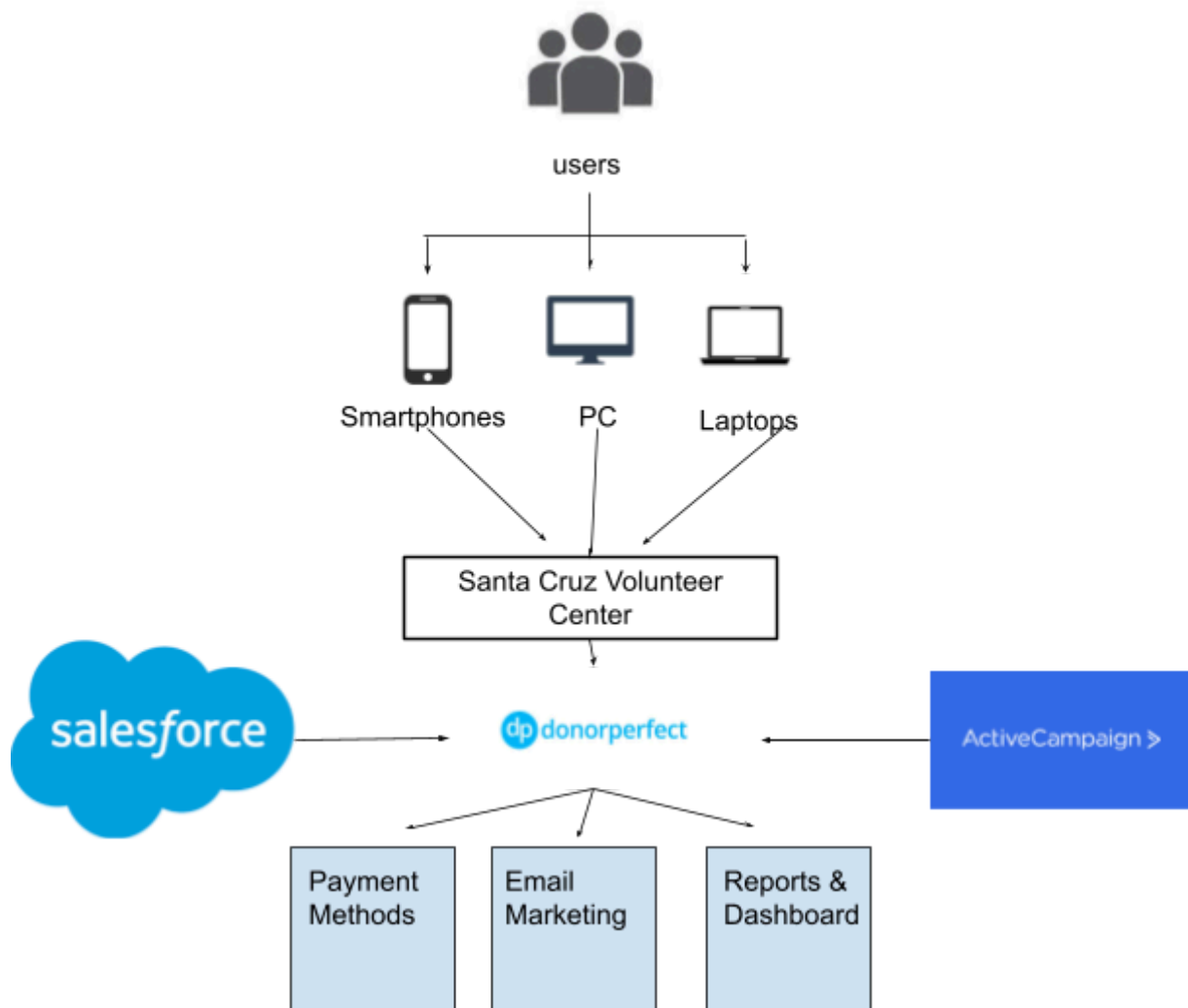
## Project Organization Diagram
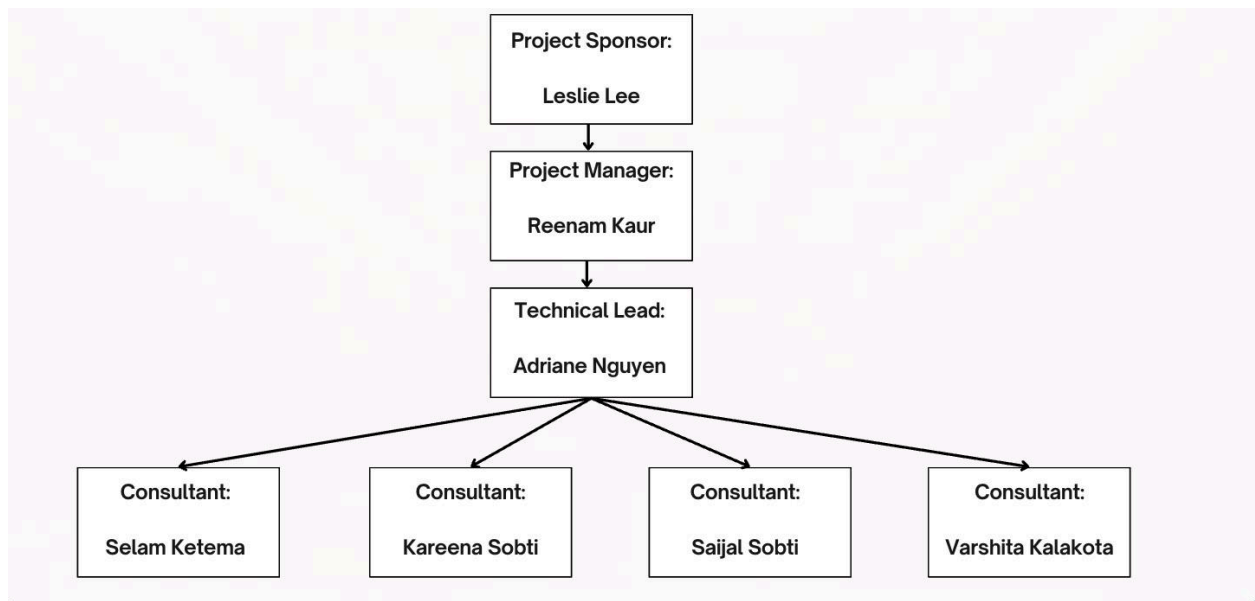
## *Project Closure Checklist*

| Task | Description | Due Date | Status |
|---|---|---|---|
| Develop Project Charter | Met up with each member of the team to outline how the project should take place. | March 19. 2025 | COMPLETED |
| Assess Current System & Identify Gaps | Looked into the current system and made sure to point out any problems while finding solutions for each. | April 3, 2025 | COMPLETED |
| Research New CRM/Donor Management Platforms | Researched alternatives to DonorPerfect that aligned with the sponsor's needs | April 13, 2025 | COMPLETED |
| Provide Final Recommendation on CRM Selection | Presented final findings to Leslie about other options to DonorPerfect | April 24, 2025 | COMPLETED |

## *Change Management*

**Change 1: SCVC Training Manual**

    The team and sponsor discussed creating a training manual for the volunteer team. After evaluating our schedules, we agreed to only recommending a new platform.

**Change 2: Platform Demos**

    The team planned to demo every platform we looked into: DonorDock, Bloomerang, and Givebutter. We reached out to DonorDock and Bloomerang for demos. We excluded Givebutter because we thought it was not a viable option. For DonorDock, we were able to schedule a one-on-one demo. Our team chatted with a representative and was given a lot of resources. For Bloomerang, they reached out directly to Santa Cruz Volunteer Center. Following the sponsor's request, we focused on our main recommendation, DonorDock, and did not proceed further with demoing with Bloomerang.