



Open Baskets

Statement of Work

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The statement of work document portrays the expected work and deliverables from the project team. The SOW includes project objectives, scope, research approach and team actions items and timelines.

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Company Background

Open Baskets is a non-profit organization dedicated to providing hope to individuals living with mental illness. The Open Baskets mission lays the foundation for the organization's success, "Filling the hearts, minds and souls of our neighbors that live with a mental illness."

Open Baskets was founded when Colleen Hansen's son Mike was diagnosed with a mental illness in 1997. Colleen's family began donating holiday gift baskets to Mental Health Resources (MHR) constituents in Dakota County in 2005. MHR partners with clients to increase their self-reliance, reduce dependence on hospitals and other forms of institutional treatment and to enhance clients' abilities to live full lives in the community. Mike receives the first basket every year.

Open Baskets gives hope, love, and gifts to our neighbors living with mental illness. For many of the recipients, this basket is the only gift they receive all year. Open Baskets receives many thank you letters each year expressing how meaningful these baskets really are.

Situation Assessment

Since inception Open Baskets has experienced exponential growth (10 baskets in 2005 to 1000+ in 2010). The goal is to eventually serve the entire MHR constituency (2600 clients) twice a year (totaling 5200 baskets). It is apparent, continuing to grow organically to reach the ultimate goal will require some ambitious initiatives. An estimated \$150-200k is needed annually to support the organization's vision and goals. An infrastructure is required to reach these financial goals. Additionally, donations are currently stored in Colleen's basement.

Open Baskets has prioritized the needs of the organization as follows:

1. Database
2. Marketing and Communications Plan
3. Competitor Analysis
4. Warehouse space

Objective

With the input of Open Baskets, the project team has developed four objectives. At the conclusion of this project, we will provide Open Baskets with a database management solution recommendation, marketing and communications recommendation, a non profit competitor analysis and a storage solution recommendation.

The objective of the database portion of the project is to centralize all data in an easy to use tool. Today, data is spread across multiple users in multiple different formats. In order to grow further and manage the organization's current contacts, a data management system must be implemented. A commercially available product known as Constituent Relationship Management System (CRM) can remedy the database management situation. A CRM system will manage donation and pledge information, volunteer tracking, marketing campaigns, dashboards and reports and serve as an online donation payment solution

A non-profit cannot function without people. The objective of a non-profit's marketing and communications plan is to portray the nonprofit in such a light that individuals are moved to donate time, money or resources to the cause. At this time, Open Baskets relies almost solely on word of mouth. Our objective is to create an innovative and unique, marketing and communications plan to take Open Baskets to the next level. There are a number of relatively inexpensive social networking opportunities, community awareness opportunities and communications opportunities that we will introduce to Open Baskets so that the organization is receiving the maximum return on investment for their time, resources and money.

Our third objective is to perform a non-profit competitor analysis for Open Baskets. This will identify primary competitors in the local industry and key success factors for these organizations. Ultimately we will provide findings and recommendations back to Open Baskets.

Lastly, donations received through out the year are stored in Colleen's basement. Warehouse space is required to support the desired growth, not only for storage, but also for assembly of the baskets.

Benefits

A CRM solution will improve communications, data consolidation, data accessibility and data management. The benefits of a CRM system include, improved communication with donors and volunteers, data consolidation into a single system, the ability to access data anywhere, anytime, by anyone and version management of data.

The benefits of implementing an effective marketing and communications plan are endless. With a marketing and communications plan, Open Baskets will be able to inform donors, sponsors and volunteers of contributions opportunities, recruit more donors and volunteers and create a general awareness of the organization.

A competitive analysis will benefit Open Baskets by providing insights and data points into the main competing non-profits. Open Baskets can utilize this information to shape stronger strategic plans. The competitor analysis will provide both offensive and defensive strategic context to further help identify opportunities and threats.

Open baskets would benefit from donated warehouse space. This would eliminate any additional expenses associated with storage and assembly. Colleen would also regain the use of her basement.

Scope

The project team will evaluate the stated objectives as outlined in this section. The scope of CRM system selection contains five distinct phases. Each phase will assist in gathering and identification of possible solutions. The following methodology will be used to determine and recommend a CRM system.

- Phase I – Needs Analysis
- Phase II – Define Functionality
- Phase III – Create CRM selection matrix
- Phase IV – Identify CRM candidates
- Phase V – CRM Selection

The marketing and communications portion of the project will also include five phases. In researching and identifying potential opportunities, we will be able to identify the pieces needed to develop a unique and competitive marketing campaign.

- Phase I – Needs Analysis
- Phase II- Identify Target Market
- Phase III- Research Non Profit Marketing
 - Utilize information attained through competitive analysis
 - Online Research
 - Observational
- Phase IV- Analyze Options
- Phase V- Final Deliverable

The competitor analysis consists of five phases. By taking these steps, we will better be able to advise Open Baskets on how they gain the competitive edge against similar non-profits. The competitor analysis will include the following phases:

- Phase I- Define industry, competitors and consumers
- Phase II- Define key success factors for industry
- Phase III- Rank factors
- Perform competitor research
 - Site Visits
 - Interviews
 - Online research
- Competitor ratings

Finally, the scope of warehouse selection also contains five phases. Each phase will assist in the identification of possible solutions. The phases listed below will allow us to research and select the most beneficial space solution.

- Phase I – Warehouse Needs Analysis
- Phase II – Contact local real estate offices
- Phase III – Online research/social networking

- Phase IV – Low cost alternative research
- Phase V – Analyze Options/ Select

Deliverables

Statement of Work

The Statement of Work (SOW) portrays the expected work and deliverables from the project team. The SOW includes project objectives, scope, research approach and team actions items and timelines. The statement of work will be presented to GJ Clayburn and Colleen Hansen at Open Baskets for final approval by February 1st, 2011.

Mid-Project Review

The project team will deliver an update on the project including initial findings, research findings, issues and challenges, direction of the project and a work plan update on March 15th, 2011.

Field Project Analysis

The field project analysis will consist of the team's findings throughout this project. The final deliverables will consist of the following:

CRM Deliverables:

- Constituent Relationship Management System Recommendation
- Constituent Relationship Management System Demo

Marketing and Communications Plan Deliverables:

- Marketing and Communications Plan Recommendation
- Decision Matrix with analysis of marketing and communications recommendations

Competitor Analysis Deliverables:

- Competitor Success Matrix
- Supplemental findings and recommendations

Warehouse Deliverables

- Research findings
- Warehouse Recommendations

The final deliverables will be presented in electronic, verbal and written form to GJ Clayburn and Colleen Hansen on April 26th, 2011.

Dependencies

The dependencies listed below could potentially affect the successful completion of the project:

- Colleen and GJ are our primary information sources. They both work full-time in addition to running Open Baskets. Their availability to the project team is essential.
- Availability of the existing data structures.
- The primary source for the competitor analysis will come directly from the competitors. We are dependent on the responsiveness of these organizations for successful information gathering.
- Each team member is focusing on one need, but there may be dependencies between initiatives. Communication breakdowns could occur as a result.

Assumptions

Based on our initial conversations, the following assumptions have been made in regards to the project. These assumptions will be utilized to develop guidelines around our recommendations:

- The CRM seller will not develop any custom software.
- Funds are limited.
- Open Baskets can fulfill the resource commitment for implementation.
- In the near-term Open Baskets will continue to run with an entirely volunteer base of resources.
- Warehouse space is not currently in the budget. If donated space is not possible, a warehouse budget will be considered.
- Open Baskets has outgrown their current facilities however, in order to grow further, new measures must be taken.
- Current marketing consists of a website and word of mouth.

Constraints

Based on our initial findings, we have discovered the following constraints which will assist as we develop guidelines:

- Open Baskets currently invests all available monies into basket creation. It will be a strategic investment to divert money to tools which can further their cause.
- There are a wide variety of non-profits in operation, Open Baskets will need to develop a plan setting them apart from all other nonprofits.
- The project timeline is for the duration of this module. We have a limited amount of time to do a large amount of work.
- Availability of GJ and Colleen.
- The four project team members have limited knowledge and experience in regards to non-profits.
- The research being conducted is being done by students versus professional consultants.

Risks

The following risks could potentially affect the success of the project and of the organization:

- Due to lack of volunteered information from competitors the analysis portion could be incomplete resulting in incomplete recommendations.
- Findings may require additional capital for warehouse space.
- The project team may have too broad of focus.
- GJ and Colleen may not agree with the progress or recommendations made in the Mid Project Review or Field Project Analysis.

Project Schedule Summary

The project is scheduled to begin on January 4, 2011 and end on April 19, 2011. On April 19, the project team will present findings and recommendations to GJ and Colleen of Open Baskets. A summary of key milestones can be found below. The Detailed Work Plan and GANTT chart found

on pages thirteen through fifteen of the Statement of Work. These documents provide a complete outline and timeline with responsibilities.

Key Milestones

- SOW signed by Open Baskets (2/1/2011)
- Mid-Project Review Presentation (3/15/2011)
- Final CRM Deliverable (3/22/2011)
- Final Marketing Deliverable (3/22/2011)
- Final Competitor Analysis Deliverable (3/22/2011)
- Final Warehouse Deliverable (3/22/2011)
- Final Recommendation Presentation (4/19/2011)

Signatures

An authorized signature below indicates Open Baskets has accepted this Statement of Work.

In witness whereof, the parties have executed this Statement of Work as if the date first written below.

Open Baskets

Hamline Project Team

Authorized Signature

Authorized Signature

Printed Name/Title

Printed Name/Title

Date

Date



Detailed Work Plan

CRM		Start	Finish
Needs Analysis	Perry	2/7/2011	2/18/2011
Functionality Definition	Perry	2/21/2011	2/28/2011
CRM Selection Matrix	Perry	2/28/2011	3/7/2011
Identify Candidates	Perry	2/28/2011	3/7/2011
CRM Selection	Perry	3/7/2011	3/15/2011
Marketing/ Communications Plan			
Needs Analysis	Lyndsy	2/7/2011	2/12/2011
Identify Target Market	Lyndsy	2/7/2011	2/12/2011
Research Competitor Marketing: Partner with Amanda and Online Research	Lyndsy	2/20/2011	3/4/2011
Analyze Options	Lyndsy	3/4/2011	3/1/2011
Final Deliverable	Lyndsy	3/1/2011	3/15/2011
Competitor Analysis			
Define Industry, Competitors and Consumers	Amanda	1/17/2011	1/28/2011
Define Key Success Factors and Ranking for Industry	Amanda	1/28/2011	2/1/2011
Perform Competitor Research: Complete Site Visits, Interviews, and Online Research	Amanda	2/2/2011	3/4/2011
Competitor Ratings	Amanda	3/5/2011	3/11/2011
Final Deliverable	Amanda	3/12/2011	3/15/2011
Warehouse Space			
Warehouse Needs Analysis	Jeremy	1/24/2011	2/7/2011
Contact local real estate offices	Jeremy	2/7/2011	2/14/2011
Online research/social networking	Jeremy	1/24/2011	2/14/2011
Low cost alternative research	Jeremy	2/14/2011	3/4/2011
Analyze Options	Jeremy	3/5/2011	3/11/2011
Final Deliverable	Jeremy	3/12/2011	3/15/2011
Mid-Project Review			3/15/2011
Project Status	All	3/3/2011	3/10/2011
Changes & Explanation of Changes	All	3/3/2011	3/10/2011
Successes and Learning Experiences	All	3/3/2011	3/10/2011
Project Adjustments	All	3/3/2011	3/10/2011
Project Scope Changes	All	3/3/2011	3/10/2011
Accomplishments	All	3/3/2011	3/10/2011
Tasks Still Remaining	Perry	3/3/2011	3/10/2011
Review of Deliverables	Amanda	3/3/2011	3/10/2011
Gantt Chart Update	Jeremy	3/3/2011	3/10/2011
Final Editing	Lyndsy	3/3/2011	3/11/2011
Mid-Project Review Presentation		3/11/2011	3/15/2011
Mid-Project Review Power Point	Amanda	3/11/2011	3/15/2011
Final Decision Determination			3/15/2011 3/22/2011
CRM	Perry	3/15/2011	3/22/2011
Marketing/ Communications Plan	Lyndsy	3/15/2011	3/22/2011
Warehouse Space	Jeremy	3/15/2011	3/22/2011
Field Project Analysis			
Paper Compilation	All	3/22/2011	4/12/2011
Executive Summary	All	3/22/2011	4/12/2011
Final Editing	All	4/12/2011	4/14/2011

Statement of Work

Project Analysis Binding	All	4/14/2011	4/16/2011
Field Project Analysis Presentation		4/12/2011	4/19/2011
Field Analysis Power Point	Amanda/ Perry	4/12/2011	4/19/2011

