ORGANISATIONAL DEVELOPMENT

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MEMBERSHIP MANAGEMENT SYSTEM TOOLKIT

Organisational Development
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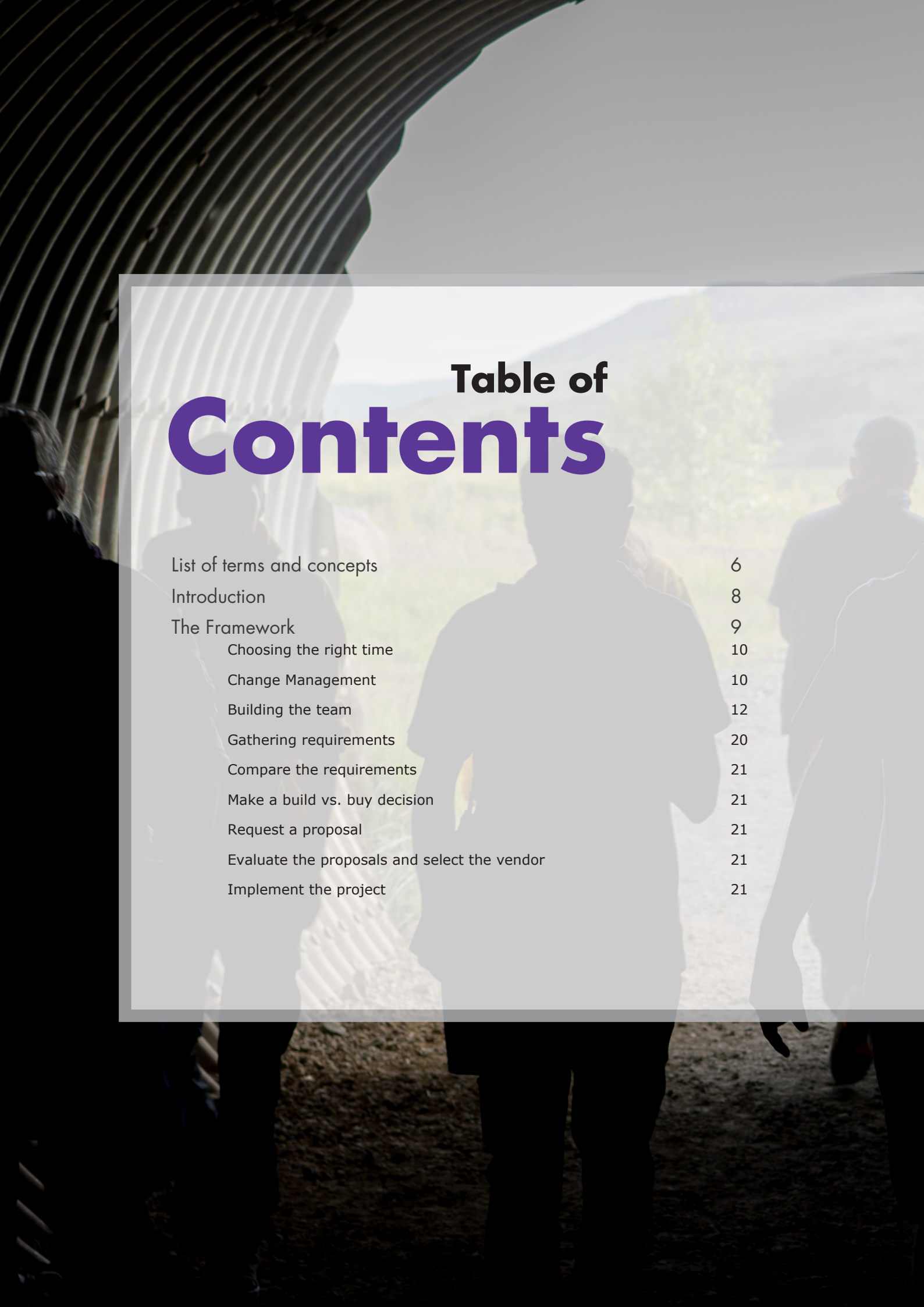

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List of terms and concepts

Term	Description
SaaS	Software as a Service Software as a service is a software licensing and delivery model in which software is licensed on a subscription basis and is centrally hosted. It is sometimes referred to as "on-demand software", and was formerly referred to as "software plus services" by Microsoft.
MMS	Membership Management System Membership software (also known as an association management system) is a computer software which provides associations, clubs and other membership organisations with the functionality they require to provide their services to their members.
app	Application App is short for "application", which is the same thing as a software programme. While an app may refer to a programme for any hardware platform, it is most often used to describe programmes for mobile devices, such as smartphones and tablets.
GDPR	General Data Protection Regulation European Union and the European Economic Area. It also addresses the export of personal data outside the EU and EEA areas.
PCI-DSS	Payment Card Industry Data Security Standard The Payment Card Industry Data Security Standard is an information security standard for organisations that handle branded credit cards from the major card schemes. The PCI Standard is mandated by the card brands and administered by the payment Card Industry Security Standards Council.
HTTPS	Hypertext Transfer Protocol Secure Hypertext Transfer Protocol Secure is an extension of the Hypertext Transfer Protocol. It is used for secure communication over a computer network, and is widely used on the Internet. In HTTPS, the communication protocol is encrypted using Transport Layer Security, or, formerly, its predecessor, Secure Sockets Layer.
NSO	National Scout Organization
NSA	National Scout Association
USER	A person who uses or operates a system.

Admin	Admin/System Administrator - a person who manages the system An admin/system administrator is a person who is responsible for the upkeep, configuration and reliable operation of computer systems; especially multi-user computers, such as servers. The admin seeks to ensure that the uptime, performance, resources and security of the computers they manage to meet the needs of the users, without exceeding as set budget.
Role	A collection of permissions defined for the entire system.
API	Application program interface In computer programming, an application programming interface is a set of sub-routine, definitions, communication protocols, and tools for building software. In general terms, it is a set of clearly defined methods of communication among various components.
SSO	Single Sign-On SSO is an authentication process that allows a user to access multiple applications with one set of login credentials. SSO is a common procedure in enterprises, where a client accesses multiple resources connected to a local area network.
MailChimp	Is a marketing automation platform and an email marketing service.
SLA	Service Level Agreement A service-level agreement is a commitment between a service provider and a client. Particular aspects of the service – quality, availability, responsibilities – are agreed between the service provider and the service user.
SSL	Secure Sockets Layer SSL is the standard security technology for establishing an encrypted link between a web server and a browser.
IE	Internet Explorer (web browsers developed by Microsoft and included in the Microsoft Windows line of operating systems).
UAT	User Acceptance Testing In software development, user acceptance testing - also called beta testing, application testing, and end user testing - is a phase of software development in which the software is tested in the "real world" by the intended audience.
Agile software development	Approach to software development under which requirements and solutions evolve through the collaborative effort of self-organising and cross-functional teams and their customer(s)/end user(s).

Introduction

The "Membership Management System ("MMS") Toolkit" is designed to be used by National Scout Organizations (hereinafter NSOs) to help them navigate, what can otherwise seem like a complex process, of engaging with a third-party supplier to secure a membership management system.

As part of the WSC's Triennial Plan 2017-2020, it was highlighted that strong and sustainable NSOs is a goal and the Good Governance workstream supports NSOs to ensure continuous improvement. Under this workstream a Unit was established in order to focus on developing a Toolkit to support the delivery of a Membership Management System.

The Toolkit will guide National Scout Organizations to make a decision associated to implementing a Membership Management System. The Toolkit will give the NSO the ability to consider an "off-the-shelf" product or a bespoke solution.

A Membership Management System will enable:

- To measure and demonstrate the impact of Scouting to the broader community as well as for continuous improvement.
- Supporting and strengthening the capacity of the National Scout Organization with regard to Good Governance principles.
- Capturing correct data in association to membership numbers for the NSO, including collections of fees and maintenance of a historical and updated official record of its members.
- Generate data and statistical information, which will make good decisions for the future of the organisation.

The Framework

Specifically, the Toolkit is for NSOs who wish to use an "off-the-shelf" existing product to assist with:

- Scoping out the standard requirements for an NSO in terms of membership management.
- Identifying existing 3rd party software / web tools on membership management, being mindful to include those already in use in membership-based organisations.
- Comparing 3rd party tools against a standard scope of requirements, developing a feature matrix enabling the NSO to easily understand the functionality of existing tools against the "standard requirements".

Alternatively, an NSO may wish to develop a "bespoke" solution. The Toolkit is also designed to provide guidance to NSOs in:

- Analysing their specific needs
- Translating needs into a proper request for proposal
- Running a proper tender and selection with software companies on the market
- Contracting a selected supplier
- Overseeing project management during design, development and deployment phase
- Providing guidance on maintenance after deployment (including SLAs etc)

Framework:

1. **Choose the right** time to begin the process of introducing the MMS in your NSO.
2. **Change Management is imperative for the success of the delivery of implementing the MMS.**
3. **Build a team** of knowledgeable people to support the introduction of the MMS in your NSO.
4. **Analyse the current situation** with regards to membership management and registration processes; identify the needs and key stakeholders.
5. **Gather requirements** for the MMS.
6. **Compare the requirements** with the solutions available on the market.
7. **Make a build-or-buy decision.**
8. **Request a proposal** from list of vendors.
9. **Evaluate the proposals and select the vendor for the system.**
10. **Implement the system.**
11. **Maintain the system**.

Choosing the right time

Choosing the right time to begin this journey is an important factor to be considered. The

development of a new MMS for an NSO can occur for a few different reasons:

1. The NSO does not have an MMS and would like to implement one; or
2. The existing MMS no longer meets the criteria for efficient membership management and reporting.

Change Management

It is crucial that every NSO ensures the managing of change. It is a major part of the work required to make the project successful. The Membership Management System aligned with the procedures in place will facilitate your NSO in achieving its goals. There are decisions needed to be made which will impact on the way your members interact with your membership processes, therefore good change management is needed. You need to invest the time into bringing your NSO on the journey with you – a tool which may help you in this process is provided below.

We will use a popular change model for explaining and managing the process of change. This follows a five-step approach:

1. Gain commitment:

a. demonstrate commitment in leadership

b. examine communication systems

c. use facts rather than hype and spin

d. explain the benefits

e. explain why the changes are taking place

2. Decide where you want to be:

a. what is your vision

b. what about three years' time

c. assign priorities

d. set objectives

e. consult as widely as possible

3. Define where you are now:

a. collect data and facts

b. talk to people – consult as widely as possible

4. Plan how to get there:

a. develop options

b. choose methods

c. plan

d. allocate tasks

e. select a project manager

f. deal with resistance

5. Implement:

a. monitor

b. adapt

Changes your NSO would like to implement:

Change I would like to implement:	
What to do:	**How to do it:**
1. Gain commitment	
2. Decide where you want to be	
3. Define where you are now	
4. Plan how to get there	
5. Implement	

When managing change, remember:

- change is a process, not an event
- get everyone involved
- publish early success
- expect it to take longer than you anticipate
- don't expect to be able to control all factors

Building the team

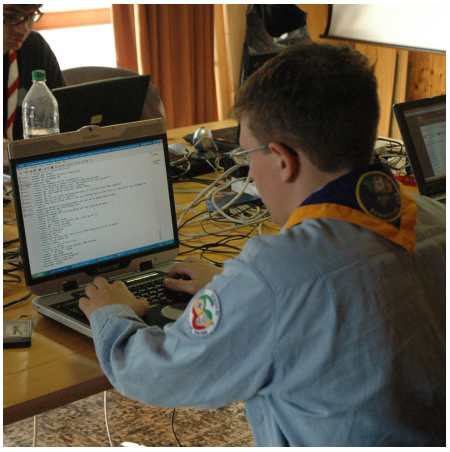
Choosing the right team of people to implement the MMS is a critical step towards ensuring the success of the project. Successful projects take careful planning, a talented team and collaboration of a project's team members, both internal and external (NSO and potential vendor representatives).

Based on the best practices we recommend that the people involved in your team should:

- Be a small group of five to seven dedicated volunteers and professionals. This can be flexible and may vary depending on the size of the NSO. For some NSOs, a larger group may be needed although the group, ideally, should not exceed 15 members.
- Have the knowledge of membership management process within the NSO.
- Have a strong understanding of the organisational needs of your NSO.
- Be able to compile input from different stakeholders and negotiate priorities.
- Have a commitment to not only developing the requirements but also following it through to the implementation and the monitoring of the successes (and challenges) your NSO achieves throughout the implementation.

Following the current trends, we strongly recommend using an agile approach to the team structure and operations. In agile approaches, the three common team roles are used:

Product Owner - responsible for guiding the direction of the product i.e. the MMS, focusing on its "business" value for the NSO. The product owner provides feedback and steers the direction of the next piece of functionality to be developed. He/she works with the external stakeholders, end users, and teams to define the project direction.



Cross-functional Team Members - team members with skills necessary to deliver the working system. If the MMS system is delivered by a supplier, the technical team members reside with the supplier, however, there are usually other team members required from the NSO to assure system acceptance and smooth transition to the production use.

Team Facilitator - this role can be called a project manager, scrum master, project team lead etc. The team facilitator provides facilitation, coaching and impediment removal. If the MMS system is delivered by a supplier, the team facilitator role for the software development resides with the supplier, however, team facilitation is usually needed from the NSO.

Suppliers / Vendors - Suppliers and vendors are third party companies or specific people that work for third parties. They may be subcontractors who are working under your direction, or they may be supplying material, equipment, hardware, software or supplies to your project. Depending on their role, they may need to be identified and included in your team. For instance, if you are partnering with a supplier to develop your requirements, you probably want them in your team. On the other hand, if the vendor is supplying a common piece of hardware, you probably would not consider them a part of the team.

Users / Testers - These are the members and people who will actually use the deliverables of the project. These people may also be involved heavily in the project in activities such as defining the requirements. In other cases, they may not get involved until the testing process. Sometimes you want to specifically identify the user organisation or the specific users of the solution and assign a formal set of responsibilities to them, like developing use cases or user scenarios based on the needs of your requirements.

Finally, there are several elements in the work dynamics that are crucial to building a productive team:

Communication: Effective communication is the most important part of teamwork and involves constantly updating each person. Never assume that everyone has the same information. Being a good communicator also means being a good listener. By listening to your team, you show them respect, which is an essential trust-building method. Collaborating and being open to new ideas are also essential ingredients for a harmonious team environment.

Delegation: Teams that work well together understand the strengths and weaknesses of each team member. One of the benefits of strong teamwork is that team leaders and members are adept at identifying all aspects of a project and allocating tasks to the most appropriate team members.

Efficiency: A strong and cohesive team develops systems that allow them to collaborate efficiently to complete tasks in a timely manner. Through working together, team members will be aware of their own capabilities and the capabilities of the group in general and can organise the workload accordingly.

Ideas: When a team works well together, colleagues feel more comfortable offering suggestions and ideas. A respectful and trusting team environment will not only enable colleagues to think more creatively but will lead to more productive and collaborative brainstorming sessions.

Support: All projects provide challenges but having a strong team environment in place can act as a support mechanism. Building bonds of trust and reliance on each other can be extremely important when facing a particularly difficult challenge or if the group is forced to deal with the loss of a team member while continuing to maintain productivity.

Analysing the current situation

Getting a comprehensive understanding of the current state of your NSO and the context in which you operate, is crucial in terms of developing an efficient MMS for your organisation, stakeholders and your members. There are several steps involved in this analysis, including assessing internal capacities, requirements and identifying stakeholders.

The analysis shall cover the following areas such as the current membership management processes, the needs of the NSO and internal capacities (human, financial, organisational) available.

Part of this analysis process is to identify the stakeholders - people or groups that will be impacted by the MMS implementation project, analyse their expectations and impact on the project. The usual stakeholders for the MMS implementation projects are, but not limited to, the following:

National Board - the National Board plays a supportive role in the project and provides strategic decisions with regard to the project implementation and project funding.

Leaders - leaders at all levels, as a future end-user for the MMS, have to be informed about the project progress, provide feedback and be trained for the use of the MMS.

Individual Members - individual members, as potential end-user for the MMS, have to be informed about the project progress and provide feedback based on their experience from working with the system.

This short video provides some tools and techniques on how to complete stakeholder analysis

Creating a product vision board

A product vision board is one method to quickly and clearly set out what you are hoping to achieve with your MMS on one page. It can be used internally within your NSO and/or shared with software suppliers to show what you are hoping to achieve.

By creating product vision boards with the key stakeholders in your NSO, it can help you to articulate your vision, target user group, needs, what the product is and your goals for the membership management system.

An example product vision board and template can be found in Appendix D.

NSO/NSA Self-assessment

This self-assessment tool can be used to help your NSO to identify if you are ready to implement an MMS and which development route is right for your needs.

Appendix A provides a self-assessment for NSOs to help you establish which of the MMS project options may be best for you.

The self-assessment will take you through the following questions -

NSO/NSA Self-assessment

This self-assessment tool can be used to help your NSO to identify if you are ready to implement an MMS and which development route is right for your needs.

Appendix A provides a self-assessment for NSOs to help you establish which of the MMS project options may be best for you.

The self-assessment will take you through the following questions -

- Do you already have an MMS in place?
- What is your budget?
- What knowledge, skills and expertise do you have available in or to your NSO?
- Do you have or are you able to form a project team?
- Do you have existing structures or frameworks for managing processes and collecting data for the following?

1. Youth programme
2. Awards
3. Training
4. Event management
5. Finance management
6. Scout places/venues
7. Programme planning
8. Fundraising
9. Communications/Marketing
10. Inventory/Asset Management

Size of your NSO?

Time available?

Can your processes change and adapt?

Options for your MMS

There are three main options available Software as a Service (SaaS), customisation and configuration of an off-the-shelf software or a custom-built option.

Software as a Service

SaaS (Software as a Service), is software that runs on the Internet (in the 'cloud'). Often you will create an account and then subscribe to a service that is provided through a website.

There are many positives to using a SaaS development in your NSO, including:

- Leverage costs over a larger user base;
- You run your MMS and let the cloud company ensure the software is online;
- Cost-effective;
- Backed by on-going maintenance/development;
- Shorter launch cycle;
- Greater level of resources available; and
- Ability to follow best practice.

However, this also comes with some challenges:

- You leave your data with the company operating the system (there may be data exporting features available);
- No guarantee about how long the system will be available;
- System features can change and may cause dysfunction in your processes;
- You may need more than one application to address all your requirements;
- Cloud App may leave you completing more work offline to compensate for the shortcomings of the programme;
- Costs of re-development can be more than building your own.

In short, SaaS is a great way to leverage technology for a fraction of the cost. However, you are using a generic platform and can often compromise your own procedures to work within the parameters of the software.

Often using SaaS can be a great solution for generic functions in your NSO but may not always suit supporting core competencies.

Customisation and Configuration

In between SaaS and custom software, some software companies offer their own systems however they allow for the system to be customised and/or configured so it meets your NSO's specific needs. There are normally two ways this is offered, the company themselves to complete the work requested and they charge you for this in addition to the licence costs or they provide developer access so you can customise/configure it yourself.

There are a few positives to this option; however, it should be approached cautiously and knowingly.

- Leverage costs over a larger user base;
- You run your MMS and let the cloud company ensure the software is online;
- Could be cost-effective;
- Potentially backed by on-going maintenance/development (depending on the supplier and the options you take with them);
- Shorter launch cycle;
- You may be able to link it up with other systems you may have;
- You may have more control over the system;
- You may not have to compromise your procedures to fit the software;
- Greater level of resources available; and
- Allows you to build brand through your system.

However, this also comes with some challenges:

- You leave your data with the company operating the system (there may be data exporting features available);
- No guarantee about how long the system will be available;
- System features can change and may cause dysfunction in your processes, or could stop working with your customised features;
- If you decided to complete the development in-house this could cost more than you anticipate and leave you with a system which is out of support or an unusable system if it goes wrong;
- You may need more than one application to address all your requirements;
- Cloud App may leave you completing more work offline to compensate for the shortcomings of the programme;
- Costs of re-development can be more than building your own.

Custom Software

On the other side of the coin to SaaS, Custom Software (specifically those available online) is just that - software designed and developed to your specific requirements. As opposed to Cloud Apps, Custom Software is not an easy task to implement/evaluate, so it is important to ensure that it is approached cautiously. If done well, the benefits can be fantastic.

Here are some key positives of the Custom Software approach:

- You get exactly the features you need;
- You own the data;
- You have more control over the system;
- Don't have to compromise your procedures to fit the software;
- Can replicate best practice that you have;

However, this comes with some challenges:

- The development cycle takes longer;
- Costs can be higher;
- Ongoing maintenance required to ensure that the system continues to function;
- Management of hosting/data becomes your responsibility; and
- Greater dependence on your developer to get the right solution.

If your NSO is looking to "systematise" unique core processes, then you cannot go past Custom Solutions. Capturing and replicating core competencies in a system can lead to amazing results. There are a lot of risks in going down this path - it requires a development programme that is well researched and employs people with the competency to deliver.

In the end, SaaS solutions, customisation/configuration and custom software present viable solutions. It is important that when considering alternatives, you evaluate alternatives on all sides of the development spectrum and choose the option that best suits the requirements of the system. Do not be led by a supplier trying to sell you a product that is ultimately not right for your NSO's situation.

Gathering requirements

Often unsuccessful projects finished with the statement "the requirements were not clear". Gathering requirements is a way to solve this problem, but it is also very challenging and needs some real structure and thought for it to be successful.

Gathering requirements refers to the practice of defining the software requirements. At its core it is really trying to understand the process of what it is you want to have built and why you are building it. There is a process to determine, document and manage stakeholder needs and requirements to define the product and project scope.

There are several techniques that can be used to gather requirements from the stakeholders: brainstorming, interviews, focus groups, user stories, questionnaires and surveys or benchmarking with other NSOs. There are some easy steps to follow:

- Establish project goal and objectives early
- Document every requirements elicitation activity
- Be transparent with requirements documentation
- Talk to the right stakeholders and users
- Don't make assumptions about requirements
- Confirm, confirm, confirm
- Practice active listening
- Focus on business requirements, not tools
- Prioritize product features
- Remember that you didn't get everything

To streamline this process in the NSO, there is a requirement blueprint that should be enhanced and adjusted by the NSO to document their requirements for the MMS. The requirement template can be found alongside this guide.

More information about how to work with the template can be found in Appendix B.

Compare the requirements

As there are existing solutions available on the market, the next step would be to analyse if the existing solutions are able to match the NSO requirements. The requirement template is available as a part of this toolkit and provides mapping between the standard requirement and the existing solutions. The NSOs can amend this comparison for their specific requirements and/or other vendors.

Make a build vs. buy decision

Based on the comparison outcome, the NSO can make a decision if they would like to develop their own MMS or buy an existing "off-the-shelf" product, potentially with the ability to make customisations.

Request a proposal

Based on the build vs. buy decision, the NSO shall send the project documentation including the MMS software requirements to the potential vendors, and ask them for a technical and price proposal for implementing the MMS. It is a good practice that the technical proposal is separated from the price proposal.

Evaluate the proposals and select the vendor

The vendor proposal should be evaluated by the evaluation body to select one or more successful bidders. The evaluation body reviews each submitted proposal according to the selection criteria and selects the vendor that can best satisfy the NSO requirements in terms of functionality and pricing. Before the contract can be awarded to the selected vendor, keep in mind that National Board approval might be required.

Implement the project

After the contract with the vendor is signed off, the project can move to the implementation stage. We recommend that NSOs use the agile approach to delivering the project if the collaboration with the vendor allows for that. Following the agile approach, the project is delivered in short, usually 2-week iterations called sprints and other agile practices such as retrospective, backlog preparation, backlog refinement, daily stand-ups and demonstration/reviews allow for constant adaptations to the ever-changing organisational environment.

Next steps

It is now up to you – do you decide to implement a very basic MMS or are you ready to embark on a bespoke MMS for the NSO?

Keep in mind that the Toolkit includes a Standard Scope of Requirements that enables you to set the level of MMS that you could set up for your NSO and decide the best product for your NSO/NSA. There are three functional options within the Scope of Requirement:

- Basic
- Advanced
- Professional

The right version for you depends on the objectives, needs and requirements of the NSO implementing an MMS.

The first step is to follow this guideline no matter what level you think you require. Start building your team and gathering requirements regardless of the product level you think you will implement. You then will go to market for the product you are looking for, whether this is for an "off the shelf" package via desktop research or a bespoke product through a Request for Proposal (RFP) model.

It is imperative that you speak with other NSOs who have also gone down the path of implementing a membership system. Understand why they went with what they did, consider the various packages/ vendors that they spoke with and take the time to find out what worked for them, what were the challenges and more importantly what they would do differently.

Put your people first - talk to the members of your NSO who will be using the system. Really delve into what the user of the MMS really wants it for and no matter which path you decide to follow this will only drive project success.

The final recommendation is to contact the WOSM Support Centre to guide you on the appropriate course of action depending on the MMS you wish to proceed with.

Appendixes

A. NSO Self-Assessment (survey)

B. How to use the Scope of Requirements

C. Product Vision Board (Target group, Needs, Product, Business goals)

D. RFP Template

E. Writing user stories

Appendix A: NSO Self-Assessment

This self-assessment tool will help to indicate if your NSO should consider the Basic, Advanced or Professional level requirements.

The questions should help you to reflect and consider if your NSO is ready to consider an MMS project.

Tick the box next to the answer which applies to your NSO's current situation.

Has your national board agreed to your MMS project?

□ Yes - 5 points

□ No - 2 points

□ Don't Know - 0 points

Do you already have an MMS in place?

□ Yes - 5 points

□ No - 2 points

□ Don't Know - 0 points

What is your budget for MMS in the context of your country?

□ Don't Know - 0 points

□ No budget - 0 points

□ Low budget - 2 points

□ Medium budget- 3 points

□ Significant budget- 5 points

What knowledge, skills and expertise in leading/managing digital/membership systems work/ projects do you have available in or to your NSO?

□ Don't Know - 0 points

□ None - 0 points

□ Limited amount - 2 points

□ Limited amount but our budget allows for getting in the right team - 4 points

□ We have a team who lead digital/ membership systems work/ projects - 5 points

Do you have or are you able to form a project team?

□ Yes - 5 points

□ No - 0 points

□ Don't Know - 0 points

Size of your NSO?

□ <5000 members - 2 points

□ 5000 - 30,000 members - 3 points

□ 30,000 - 100,000 members - 4 points

□ >100,000 members - 5 points

Time available to deliver the project?

□ < 6 months - 2 points

□ 6 months - 18 months - 4 points

□ >18 months - 5 points

Can your processes change and adapt?

□ Yes - 5 points

□ No - 2 points

□ Don't Know - 0 points

Do you have existing structures or frameworks for managing processes and collecting data for the following?

□ Youth programme

- □ Yes - 5 points
- □ No, but we want to develop one as part of this project - 2 points
- □ No, we don't want to include this in the MMS project - 1 point
- □ Don't Know - 0 points

□ Awards

- □ Yes - 5 points
- □ No, but we want to develop one as part of this project - 2 points
- □ No, we don't want to include this in the MMS project - 1 point
- □ Don't Know - 0 points

□ Training

- □ Yes - 5 points
- □ No, but we want to develop one as part of this project - 2 points
- □ No, we don't want to include this in the MMS project - 1 point
- □ Don't Know - 0 points

- □ Event management
  - □ Yes - 5 points
  - □ No, but we want to develop one as part of this project - 2 points
  - □ No, we don't want to include this in the MMS project - 1 point
  - □ Don't Know - 0 points
- □ Finance management
  - □ Yes - 5 points
  - □ No, but we want to develop one as part of this project - 2 points
  - □ No, we don't want to include this in the MMS project - 1 point
  - □ Don't Know - 0 points
- □ Scout places/venues
  - □ Yes - 5 points
  - □ No, but we want to develop one as part of this project - 2 points
  - □ No, we don't want to include this in the MMS project - 1 point
  - □ Don't Know - 0 points
- □ Programme planning
  - □ Yes - 5 points
  - □ No, but we want to develop one as part of this project - 2 points
  - □ No, we don't want to include this in the MMS project - 1 point
  - □ Don't Know - 0 points
- □ Fundraising
  - □ Yes - 5 points
  - □ No, but we want to develop one as part of this project - 2 points
  - □ No, we don't want to include this in the MMS project - 1 point
  - □ Don't Know - 0 points
- □ Communications/Marketing
  - □ Yes - 5 points
  - □ No, but we want to develop one as part of this project - 2 points
  - □ No, we don't want to include this in the MMS project - 1 point
  - □ Don't Know - 0 points
- □ Inventory/Asset Management
  - □ Yes - 5 points
  - □ No, but we want to develop one as part of this project - 2 points
  - □ No, we don't want to include this in the MMS project - 1 point
  - □ Don't Know - 0 points

Total points

Points	0 - 25	25 - 45	45 - 65	65 - 85
Outcome	Further consideration required	Basic	Advanced	Professional
Further information	Based on the answers you have ticked it may be worth considering if your NSO/NSA is ready to start looking at an MMS project. There may be some further resources, skills, knowledge or decisions that need to be made before you consider taking the project forward.	Based on your answers it may be worth considering the basic level requirements.	Based on your answers it may be worth considering the advanced level requirements.	Based on your answers it may be worth considering the professional level requirements.

Appendix B: How to use this Scope of Requirements

The Scope of Requirements is a document with recommendations for general and functional requirements for an MMS. The Scope of Requirements has been designed with both the complexity required for and to deliver an MMS based on the NSO's ability to implement a system that is sustainable. Sustainability refers to technology, affordability and creating long term value.

The Scope of Requirements is a working excel document which should be customised for the NSO's specific requirements. The purpose of this document is to support the software selection process by gathering the functional requirements and matching them against the vendor's offerings.

There are three functional options within the Scope of Requirement:

- Basic
- Advanced
- Professional

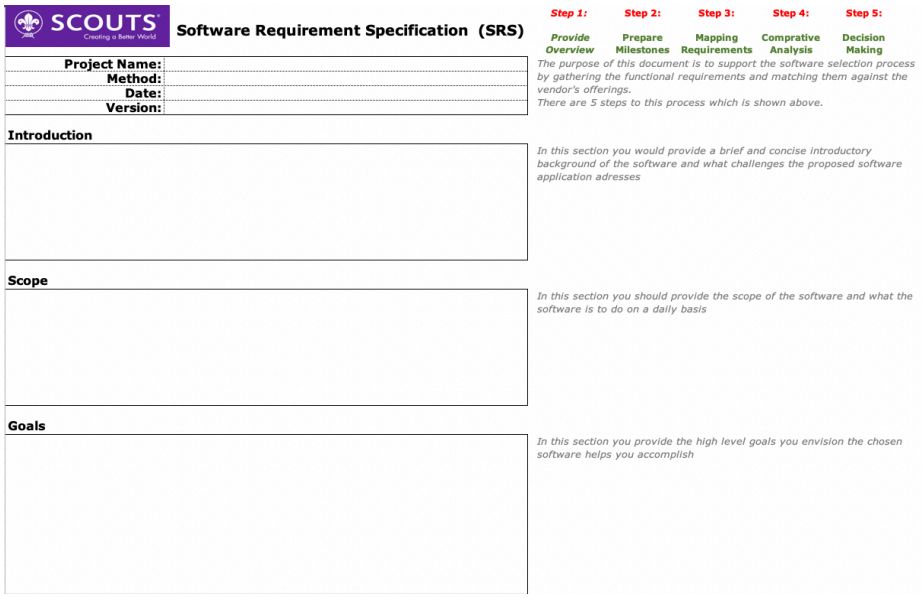
Which is determined by recommended rating framework:

MSC Rating	Function Options
M (Must Have): The system without this cannot work	Basic
S (Should Have): It would be important to consider	Advanced (including all Basic requirements)
C (Could Have): System could have this part	Professional (including all Basic & Advanced requirements)

Determining which option is best for the NSO will be determined by:

- The objectives of the NSO for implementing an MMS
- The challenges the NSO is trying to solve by implementing an MMS
- The high-level goals you want to achieve with an MMS

Section 1: Overview



SCOUTS Creating a Better World

Software Requirement Specification (SRS)

Project Name:	
Method:	
Date:	
Version:	

Introduction

Scope

Goals

Step 1: Provide Overview | Step 2: Prepare Milestones | Step 3: Mapping Requirements | Step 4: Comprative Analysis | Step 5: Decision Making

The purpose of this document is to support the software selection process by gathering the functional requirements and matching them against the vendor's offerings.
There are 5 steps to this process which is shown above.

In this section you would provide a brief and concise introductory background of the software and what challenges the proposed software application adresses

In this section you should provide the scope of the software and what the software is to do on a daily basis

In this section you provide the high level goals you envision the chosen software helps you accomplish

The Overview section is for the NSO to highlight the reasons as to why and what the MMS is to deliver once implemented. This section provides to both internal stakeholders and external vendors the reasoning behind why an MMS is required and will help vendors focus their technical responses to delivering on the goals of the NSO.

Section 2: Milestones

Project Milestones

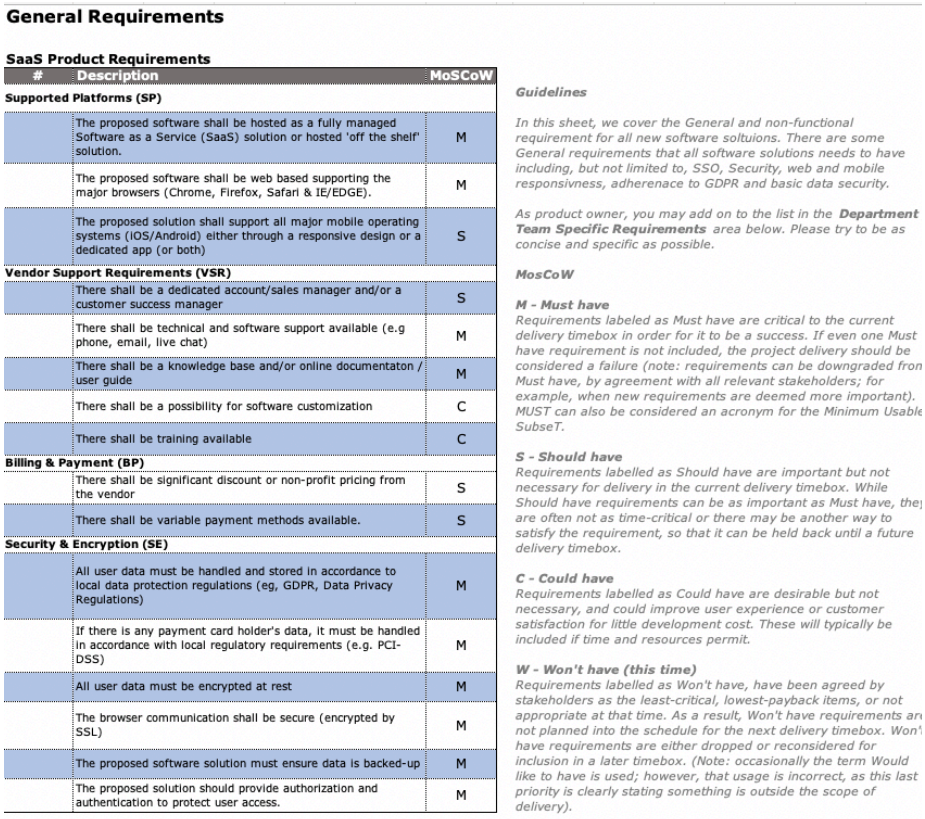
In this section you provide the timelines of when the project is to start/end including other major milestones. The most common milestones have been pre-filled for your convenience.

Milestones	Target Date (dd/mm/yyyy)
Project Start	
Requirements Gathering	
Gathering and documenting any customization	
Acceptance and sign off on the requirements (standard & customzied	
Data Gathering	
Data Sanitization and Input	
Data Validaton	
Start of UAT	
Completion of UAT	
Project Go-Live	

Project Milestones are the timelines required for delivering on the project. Timelines are critical to the success of the project being delivered on time and to budget.

Project Milestones are the visible indicators of the progress of the project and typically mark critical decision points and phases of the project.

Section 3a: General Requirements SaaS



General Requirements

SaaS Product Requirements

#	Description	MoSCoW
Supported Platforms (SP)		
	The proposed software shall be hosted as a fully managed Software as a Service (SaaS) solution or hosted 'off the shelf' solution.	M
	The proposed software shall be web based supporting the major browsers (Chrome, Firefox, Safari & IE/EDGE).	M
	The proposed solution shall support all major mobile operating systems (iOS/Android) either through a responsive design or a dedicated app (or both)	S
Vendor Support Requirements (VSR)		
	There shall be a dedicated account/sales manager and/or a customer success manager	S
	There shall be technical and software support available (e.g phone, email, live chat)	M
	There shall be a knowledge base and/or online documentaton / user guide	M
	There shall be a possibility for software customization	C
	There shall be training available	C
Billing & Payment (BP)		
	There shall be significant discount or non-profit pricing from the vendor	S
	There shall be variable payment methods available.	S
Security & Encryption (SE)		
	All user data must be handled and stored in accordance to local data protection regulations (eg, GDPR, Data Privacy Regulations)	M
	If there is any payment card holder's data, it must be handled in accordance with local regulatory requirements (e.g. PCI-DSS)	M
	All user data must be encrypted at rest	M
	The browser communication shall be secure (encrypted by SSL)	M
	The proposed software solution must ensure data is backed-up	M
	The proposed solution should provide authorization and authentication to protect user access.	M

Guidelines

In this sheet, we cover the General and non-functional requirement for all new software soltuions. There are some General requirements that all software solutions needs to have including, but not limited to, SSO, Security, web and mobile responsivness, adherenace to GDPR and basic data security.

*As product owner, you may add on to the list in the **Department Team Specific Requirements** area below. Please try to be as concise and specific as possible.*

MosCoW

M - Must have
Requirements labeled as Must have are critical to the current delivery timebox in order for it to be a success. If even one Must have requirement is not included, the project delivery should be considered a failure (note: requirements can be downgraded from Must have, by agreement with all relevant stakeholders; for example, when new requirements are deemed more important). MUST can also be considered an acronym for the Minimum Usable SubseT.

S - Should have
Requirements labelled as Should have are important but not necessary for delivery in the current delivery timebox. While Should have requirements can be as important as Must have, they are often not as time-critical or there may be another way to satisfy the requirement, so that it can be held back until a future delivery timebox.

C - Could have
Requirements labelled as Could have are desirable but not necessary, and could improve user experience or customer satisfaction for little development cost. These will typically be included if time and resources permit.

W - Won't have (this time)
Requirements labelled as Won't have, have been agreed by stakeholders as the least-critical, lowest-payback items, or not appropriate at that time. As a result, Won't have requirements are not planned into the schedule for the next delivery timebox. Won't have requirements are either dropped or reconsidered for inclusion in a later timebox. (Note: occasionally the term Would like to have is used; however, that usage is incorrect, as this last priority is clearly stating something is outside the scope of delivery).

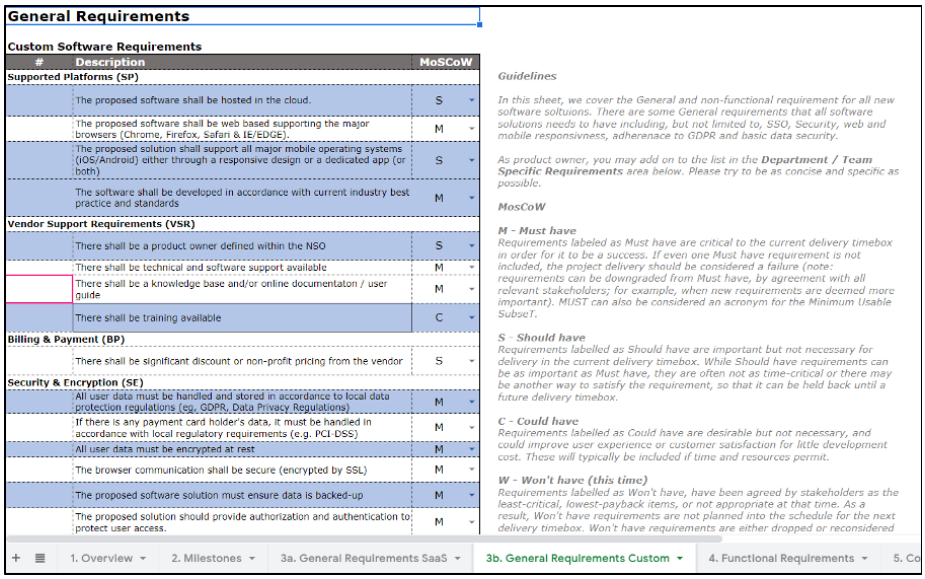
General Requirements SaaS are requirements in the case that you have selected to develop a system for your organization. The General Requirements covers the general and non-functional requirement for all new solutions. The recommendation is that all software solutions must have, but not limited to, security, web and mobile responsible, adherence to regulatory requirements and data security.

Each requirement has been given a rating as to level of need for a system indicated by:

M (Must Have): The system without this cannot work

S (Should Have): It would be important to consider

C (Could Have): System could have this part



General Requirements

Custom Software Requirements

#	Description	MoSCoW
Supported Platforms (SP)		
	The proposed software shall be hosted in the cloud.	S
	The proposed software shall be web based supporting the major browsers (Chrome, Firefox, Safari & IE/EDGE).	M
	The proposed solution shall support all major mobile operating systems (IOS/Android) either through a responsive design or a dedicated app (or both)	S
	The software shall be developed in accordance with current industry best practice and standards	M
Vendor Support Requirements (VSR)		
	There shall be a product owner defined within the NSO	S
	There shall be technical and software support available	M
	There shall be a knowledge base and/or online documentaton / user guide	M
	There shall be training available	C
Billing & Payment (BP)		
	There shall be significant discount or non-profit pricing from the vendor	S
Security & Encryption (SE)		
	All user data must be handled and stored in accordance to local data protection regulations (eg. GDPR, Data Privacy Regulations)	M
	If there is any payment card holder's data, it must be handled in accordance with local regulatory requirements (e.g. PCI-DSS)	M
	All user data must be encrypted at rest	M
	The browser communication shall be secure (encrypted by SSL)	M
	The proposed software solution must ensure data is backed-up	M
	The proposed solution should provide authorization and authentication to protect user access.	M

Guidelines

In this sheet, we cover the General and non-functional requirement for all new software soltuions. There are some General requirements that all software solutions needs to have including, but not limited to, SSO, Security, web and mobile responsivness, adherenace to GDPR and basic data security.

*As product owner, you may add on to the list in the **Department / Team Specific Requirements** area below. Please try to be as concise and specific as possible.*

MosCoW

M - Must have
Requirements labeled as Must have are critical to the current delivery timebox in order for it to be a success. If even one Must have requirement is not included, the project delivery should be considered a failure (note: requirements can be downgraded from Must have, by agreement with all relevant stakeholders; for example, when new requirements are deemed more important). MUST can also be considered an acronym for the Minimum Usable SubseT.

S - Should have
Requirements labelled as Should have are important but not necessary for delivery in the current delivery timebox. While Should have requirements can be as important as Must have, they are often not as time-critical or there may be another way to satisfy the requirement, so that it can be held back until a future delivery timebox.

C - Could have
Requirements labelled as Could have are desirable but not necessary, and could improve user experience or customer satisfaction for little development cost. These will typically be included if time and resources permit.

W - Won't have (this time)
Requirements labelled as Won't have, have been agreed by stakeholders as the least-critical, lowest-payback items, or not appropriate at that time. As a result, Won't have requirements are not planned into the schedule for the next delivery timebox. Won't have requirements are either dropped or reconsidered

1. Overview | 2. Milestones | 3a. General Requirements SaaS | 3b. General Requirements Custom | 4. Functional Requirements | 5. Co

Section 3b: General Requirements Custom

General Requirements Custom are requirements in the case that you have selected to

customize an existing system in the market. The General Requirements covers the General and non-functional requirement for all new solutions. The recommendation is that all software solutions must have, but not limited to, security, web and mobile responsible, adherence to regulatory requirements and data security.

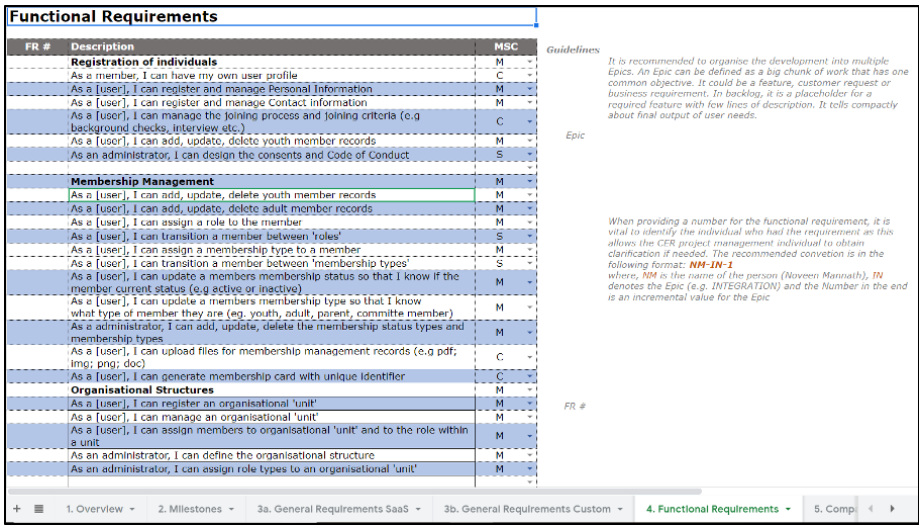
Each requirement has been given a rating as to level of need for a system indicated by:

M (Must Have): The system without this cannot work

S (Should Have): It would be important to consider

C (Could Have): System could have this part

Section 4: Functional Requirements



Functional Requirements

FR #	Description	MSC
	Registration of individuals	M
	As a member, I can have my own user profile	C
	As a [user], I can register and manage Personal Information	M
	As a [user], I can register and manage Contact information	M
	As a [user], I can manage the joining process and joining criteria (e.g background checks, interview etc.)	C
	As a [user], I can add, update, delete youth member records	M
	As an administrator, I can design the consents and Code of Conduct	S
	Membership Management	M
	As a [user], I can add, update, delete youth member records	M
	As a [user], I can add, update, delete adult member records	M
	As a [user], I can assign a role to the member	M
	As a [user], I can transition a member between 'roles'	S
	As a [user], I can assign a membership type to a member	M
	As a [user], I can transition a member between 'membership types'	S
	As a [user], I can update a members membership status so that I know if the member current status (e.g active or inactive)	M
	As a [user], I can update a members membership type so that I know what type of member they are (eg. youth, adult, parent, committe member)	M
	As a administrator, I can add, update, delete the membership status types and membership types	M
	As a [user], I can upload files for membership management records (e.g pdf; img; png; doc)	C
	As a [user], I can generate membership card with unique identifier	C
	Organisational Structures	M
	As a [user], I can register an organisational 'unit'	M
	As a [user], I can manage an organisational 'unit'	M
	As a [user], I can assign members to organisational 'unit' and to the role within a unit	M
	As an administrator, I can define the organisational structure	M
	As an administrator, I can assign role types to an organisational 'unit'	M

Guidelines

It is recommended to organise the development into multiple Epics. An Epic can be defined as a big chunk of work that has one common objective. It could be a feature, customer request or business requirement. In backlog, it is a placeholder for a required feature with few lines of description. It tells compactly about final output of user needs.

Epic

*When providing a number for the functional requirement, it is vital to identify the individual who had the requirement as this allows the CER project management individual to obtain clarification if needed. The recommended convetion is in the following format: **NM-IN-1***
where, NM is the name of the person (Naveen Mannath), IN denotes the Epic (e.g. INTEGRATION) and the Number in the end is an incremental value for the Epic

FR #

1. Overview | 2. Milestones | 3a. General Requirements SaaS | 3b. General Requirements Custom | 4. Functional Requirements | 5. Comp

The Functional Requirements are the key pieces of work which could be feature, customer request or a business requirement. The Functional Requirements have been written in a manner to support how individuals would want to use a specific area of the MMS otherwise known as a user stories. For example:

As an administrator, I can assign role types to an organisational unit.

This will then allow the vendor or project team to determine the technical function in the MMS that meets that user need statement.

This list is by no means exhaustive and could be added to or even removed from depending on the goals of the NSO.

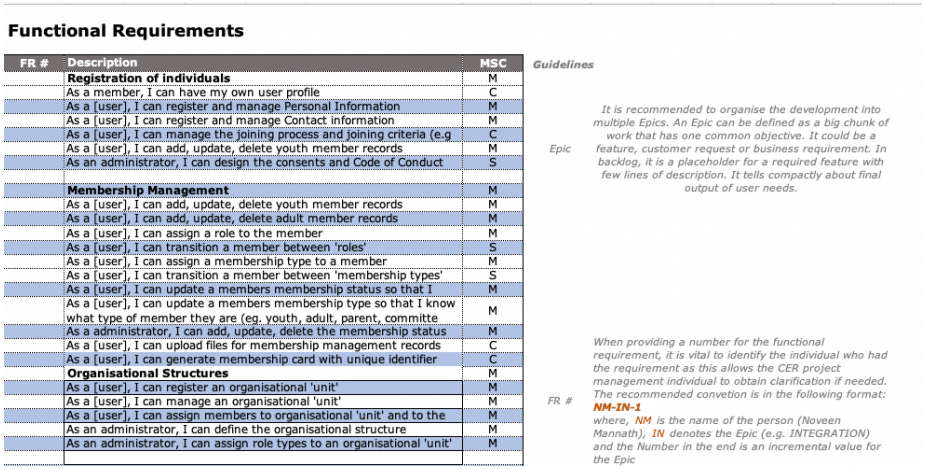
Again, the recommendations in the Functional Requirements follows the same rating framework of:

M (Must Have): The system without this cannot work

S (Should Have): It would be important to consider

C (Could Have): System could have this part

Section 5: Comparison



Functional Requirements

FR #	Description	MSC
	Registration of individuals	M
	As a member, I can have my own user profile	C
	As a [user], I can register and manage Personal Information	M
	As a [user], I can register and manage Contact information	M
	As a [user], I can manage the joining process and joining criteria (e.g	C
	As a [user], I can add, update, delete youth member records	M
	As an administrator, I can design the consents and Code of Conduct	S
	Membership Management	M
	As a [user], I can add, update, delete youth member records	M
	As a [user], I can add, update, delete adult member records	M
	As a [user], I can assign a role to the member	M
	As a [user], I can transition a member between 'roles'	S
	As a [user], I can assign a membership type to a member	M
	As a [user], I can transition a member between 'membership types'	S
	As a [user], I can update a members membership status so that I	M
	As a [user], I can update a members membership type so that I know what type of member they are (eg. youth, adult, parent, committe	M
	As a administrator, I can add, update, delete the membership status	M
	As a [user], I can upload files for membership management records	C
	As a [user], I can generate membership card with unique identifier	C
	Organisational Structures	M
	As a [user], I can register an organisational 'unit'	M
	As a [user], I can manage an organisational 'unit'	M
	As a [user], I can assign members to organisational 'unit' and to the	M
	As an administrator, I can define the organisational structure	M
	As an administrator, I can assign role types to an organisational 'unit'	M

Guidelines

Epic — *It is recommended to organise the development into multiple Epics. An Epic can be defined as a big chunk of work that has one common objective. It could be a feature, customer request or business requirement. In backlog, it is a placeholder for a required feature with few lines of description. It tells compactly about final output of user needs.*

FR # — *When providing a number for the functional requirement, it is vital to identify the individual who had the requirement as this allows the CER project management individual to obtain clarification if needed. The recommended convetion is in the following format:* ***NM-IN-1*** *where, NM is the name of the person (Noveen Mannath), IN denotes the Epic (e.g. INTEGRATION) and the Number in the end is an incremental value for the Epic*

Comparison is a matrix in which you can compare what is offered by each of the system vendors, which will allow you to analyse what each one offers and based on that information, choose the best option for your organisation.

It is designed to account for each requirement that the system vendor meets according to the requirements previously presented.

If the systems vendor offers to fulfil one of the requirements in his proposal, we must mark it, but if the vendor does not offer to fulfil a requirement in his proposal we must leave it blank that line.

Once this process is finished with each of the system vendors, the system vendor that obtains the highest score translates as the supplier that will most comply with our requirements and therefore our best option to contract.

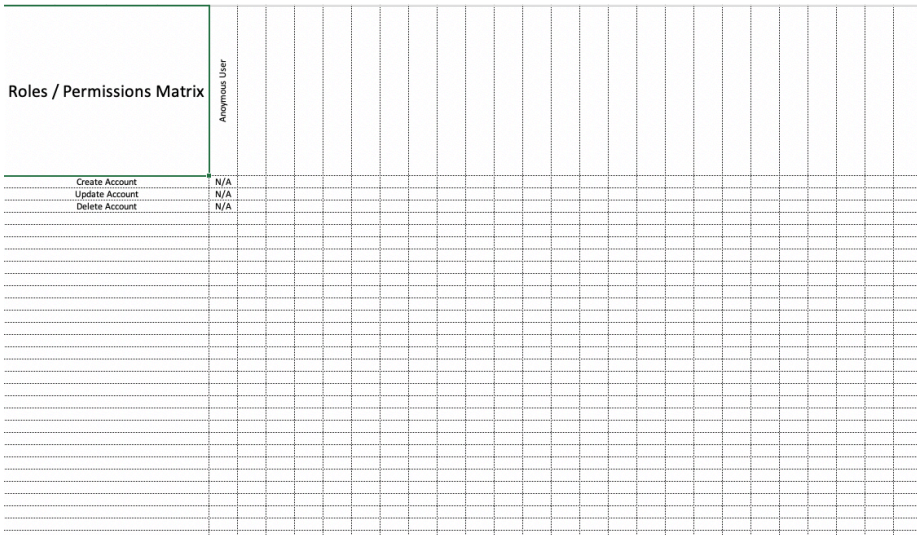
This matrix is for internal use by the NSO and should not be shared with system vendors.

If you send the Excel file with the requirements, be sure to have deleted this sheet.

Promoting the good governance of this process, we recommend that the results of this matrix be socialised with the members of the national board.

The matrix formalises the technical decision of the contracting of the MMS within the official documents.

Section: Roles Matrix



Roles / Permissions Matrix	Anonymous User
Create Account	N/A
Update Account	N/A
Delete Account	N/A

The Roles Matrix allows the NSO/NSA to map out the user's role/ permissions as either Read (R) or Read and Write (R/W).

Column A list the attributes the user can access (e.g. create a new account, view reports etc). Columns E-AC maps out the roles (e.g. unit leader, headquarters etc).

The Permissions are broken into 3 options:

- R - Read only access. Users with this permission is only able to read / view content.
- R/W - Read & Write. Users with this permission is able to read / write / update / delete content.
- N/A - No Access. User's with this permission does not possess the permission to view, read, write or delete content.

Appendix C: Product Vision Board template

Vision

What is your purpose for your MMS?

What positive change should it bring?

Target Group

Who will use the MSS?

Needs

What problem is your MSS trying to solve for the users?

What benefit does it provide to the users

Product

What type of MMS do you want?

Is it feasible to develop?

NSO Goals

How will the MMS benefit the NSO?

What are the NSO goals?

Appendix C (cont.): Product Vision Board example

Vision

What is your purpose for your MMS?

What positive change should it bring?

A membership management system that enables us to keep track of our members so we can better support them with their programme.

A system that allows us to keep our members personal data so we can contact them about events and opportunities.

A system that helps us to complete our national census.

Target Group

Who will use the MSS?

Unit leaders

Head office users

Needs

What problem is your MSS trying to solve for the users?

What benefit does it provide to the users

To move away from paper records for members so we can keep a better track of members centrally.

The members will receive better communications about events and opportunities.

Product

What type of MMS do you want?

Is it feasible to develop?

Simple easy to use system that is accessible on mobile phones.

NSO Goals

How will the MMS benefit the NSO?

What are the NSO goals?

So we accurately know the membership size of the units and reduce the admin of our national census.

Appendix D: Request for Proposal (RFP) Template

A request for proposal (RFP) is a document that an organisation uses to elicit a response -- a formal bid -- from potential vendors for a desired digital solution. The RFP specifies what you are looking for and describes each evaluation criterion on which a vendor's proposal will be assessed.

Although each RFP is unique, they should all contain enough information so that bidders can fully understand what is required and expected.
In the RFP it is helpful to include information about your organisation, relevant information for the project, the project scope, bidder qualification requirements, timeline and guidelines for the proposal.

1. **Summary and Background**

   This section of the Request for Proposal (RFP) should provide a high-level description of what the request for proposal is for and the purpose of the requirement. It may provide background information about your organisation as well. Most of the requirement details will be included in subsequent sections of the document.

2. **Proposal Guidelines**

   This section of the Request for Proposal should provide a description of what each responding organisation's proposal should contain. It should also include a timeline within which all proposals must be submitted. Any requirements that must be included in each proposal should be described in detail in this section of the RFP.

3. **Project Purpose and Description**

   This part of the Request for Proposal Template provides the purpose and description of the project or work to be performed in as much detail as possible. In order for companies to submit accurate proposals, they need the details of exactly what work needs to be performed and the purpose of the work. The purpose of the work is important because sometimes bidders may be able to provide different but more effective solutions.

4. **Project Scope**

   While the project description provides bidders with general information about the project, this part of the Request for Proposal template includes details of what exactly is required for the project as well as what is not included as part of the project. In addition to the description of the project, this section of the RFP template details any additional work required to achieve the desired result (i.e. research, coding, etc.).

5. **Request for Proposal and Project Timeline**

   The Request for Proposal should provide known information about the timeline for the RFP process as well as the project itself. Much of the project timeline will be determined in the project initiation and planning phases once the winning bidder is chosen. However, any known deadlines or time frames should be listed in this section.

6. **Budget**

   This section of the Request for Proposal should explain what bidders include in their proposals regarding budget items. Often, an RFP will ask bidders to list pricing a certain way or describe what exactly should be included in the pricing for the proposal. This may describe specific items to include or exclude depending on the project or task. This request for proposal template provides an example below.

7. **Bidder Qualifications**

   This part of the Request for Proposal should describe the criteria that will comprise the successful bidder's organisation. You may ask for examples of work from bidders, contact information for follow on questioning, company history, executive background, information on company size, organisational charts, or any other number of information to aid in the decision-making process.

8. **Proposal Evaluation Criteria**

   Here the Request for Proposal should describe exactly how proposals will be evaluated. It should include a list of criteria that will be reviewed and describe what is suitable for each of the criteria. The more detail that can be included, the more thorough and complete the proposals should be.

Appendix E: Capturing and Writing User Stories

User stories describe a user and the reason why they need to use the service you're building.

User stories can be used to:

- track everything they need to do
- think about their work from a user's perspective
- discuss their work with colleagues
- prioritise their work

How to write a user story

What to include:

Your user stories should include enough information for your product owner to decide how important the story is. They should always include:

- the person using the service (the actor)
- what the user needs the service for (the narrative)
- why the user needs it (the goal)

The normal format for user stories

User stories are usually written in the format:

As a… [who is the user?]

I need/want/expect to… [what does the user want to do?]

So that… [why does the user want to do this?]

Example user story:

As a unit leader, **I need to** collect the personal details of my youth members **so that** I know who to contact in an emergency.

You don't have to use this format but you should always briefly explain the actor, the narrative and the goal.

Focus on the goal

The most important part of a user story is the goal. This helps you:

- make sure you're solving the right problem
- decide when the story is complete and a user need is met

If you're struggling to write the goal, then you should reconsider why you think you need that feature.

Acceptance criteria

You can also include a few acceptance criteria for each story. Acceptance criteria are a list of outcomes that you use as a checklist to confirm that your service has done its job and is meeting user needs.

They're often written as a list that begins with 'it's done when…'.

Example:

The acceptance criteria for the registration for a log in to the MMS feature:

- 'it's done when the user knows how to register online'
- 'it's done when the user knows how to reset their password'
- 'it's done when the user knows they have been registered'

Use the acceptance criteria to link to any evidence (for example spreadsheets or diagrams) that support the story.

SCOUTS®
Creating a Better World

Organisational Development
May 2020

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Global Support Centre
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