



Columbia University Club of Chicago  
539 West Roosevelt Road  
Wheaton, IL 60187

## Columbia University Club of Chicago Online Integrated Registration and E-Commerce Solution - Project Charter

### **Project Title and Description**

Architect, design, build, implement, and maintain an online integrated registration and E-commerce payment solution for the Columbia University Club of Chicago

*On June 22, 2009, the Columbia University Club of Chicago (CUC) was revived, after enduring years of mismanagement and inactivity. A priority of the new board of directors is the ability for members to register online for events (such as lectures, dinners, and cultural activities) and memberships, and to accept credit card payments online as well. These changes will make it easier for members to sign up and pay, and will hopefully increase the club's revenue by instituting a user-friendly, intuitive interface and experience. Currently, members register for events and memberships by email, and make payments by sending checks to the CUC president, or by paying at the door. The integration of PayPal with Infinity Box's Wufoo online form builder was chosen as the best solution from among those that were considered, based on affordability and functionality.*

### **Project Manager Assigned and Authority Level**

*Darrell Cohn will be the project manager for this project, and will have the authority to design, program, and implement the interactive features of this new online registration and E-commerce payment solution. As the CUC Webmaster, he will also maintain the Wufoo forms and PayPal account as the club hosts future events and welcomes new members.*

### **Business Need**

*This project is being completed in order to make it easier for members to sign up for events and memberships, and make payments to CUC. Additionally, CUC is making this change to make it easier for the CUC treasurer to track and manage the club's finances, and create financial reports.*

### **Project Justification**

*The typical CUC member is used to registering and paying for services online. It is faster, more efficient, and less cumbersome than filling out a form and mailing it in with a check. From the perspective of the CUC officers, having to deal with the number of events, new members, and payments the club anticipates having post-revival, without the use of the Internet, is unrealistic. Managing RSVP emails from members isn't efficient; checks get lost in the mail; running to the bank all the time is too burdensome; and collecting cash and*

checks at an event is a non-secure method of taking payments. The easiest way for CUCC to deal with registration and payments is to create an online registration and payment solution that can be accessed from the CUCC Website, which is itself hosted by the Columbia University Alumni Association (CAA). The Harris Connect CMS Tool's HTML editor is used to edit the CUCC's Website, and it allows for the inclusion of links to outside Websites. This makes the PayPal-Wufoo online registration/E-commerce solution possible. While the club will be charged for every PayPal transaction (2.2% + \$0.30 for each transaction - this is the nonprofit rate), plus a monthly user fee for the Wufoo form builder (the "Bona Fide" plan costs \$24.95 per month), the benefits of offering an easy, user-friendly online registration and payment option to our members outweigh the costs. And, it was the most affordable option available. Additionally, having a digital paper trail of every registration and payment will enable the CUCC treasurer to keep track of the club's finances and demographics, and will enable him to create accurate quarterly and annual financial reports. Assembling information for tax and government purposes will also be easier with this electronic solution.

### **Resources Pre-assigned**

1. Darrell Cohn, CUCC Treasurer and Webmaster: Programmer, Graphic Designer, Copywriter
2. Chris Stacey, CUCC President: Copywriter, Quality Control, Consultant

### **Stakeholders**

1. Chris Stacey, CUCC President
2. Darrell Cohn, CUCC Treasurer and Webmaster
3. CUCC Board of Directors
4. CUCC Members

### **Stakeholder Requirements As Known**

*Chris Stacey, CUCC President*

1. The registration forms need to be able to handle multiple and complex conditions, with various operators and actions.
2. The integration of PayPal into the forms should be transparent.
3. Data from the transactions (finances and demographics) should be easy to download in MS Excel.
4. The forms should know which people are members and which are not, based on their name, in order to charge them the appropriate amount (NOTE: as of 11/3/2009 this was not possible in Wufoo).

*Darrell Cohn, CUCC Treasurer and Webmaster*

1. Minimal setup and programming.
2. Ability to access the solution from anywhere there is an Internet connection.
3. Users must be able to use all major credit cards (MC, Visa, AMEX).
4. CUCC should not have to buy a merchant account.
5. CUCC should not have to buy a virtual terminal.

6. CUCC should not need to do batch uploads.
7. The form builder needs to be user-friendly for the Webmaster.
8. Funds from PayPal should be easily transferable to the CUCC Chase bank account.

### **Product Description/Deliverables**

1. User-friendly online registration forms that will allow users to sign up for events and memberships, and pay with PayPal using their credit cards or their existing PayPal accounts.

### **Constraints and Assumptions**

1. The former treasurer moved to San Francisco right before the time CUCC chose to implement this solution. It has been difficult to obtain CUCC's financial information from him.
2. The former treasurer created a PayPal account for CUCC and it has been difficult to obtain the PayPal account information from him. CUCC will probably end up creating a new PayPal account and cancelling the account he setup.
3. We will try the PayPal-Wufoo solution for two months and re-evaluate then.
4. In the beginning, only the President, Treasurer/Webmaster will have access to Wufoo and PayPal.
5. While this solution requires two vendors instead of one packaged system, the Webmaster is familiar with the workings of both and is confident that they will benefit CUCC.

### **Project Sponsor Approval**

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*Chris Stacey  
Columbia University Club of Chicago  
President*

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*Darrell Cohn  
Columbia University Club of Chicago  
Webmaster, Treasurer, Project Manager*