



Project Charter and Planning Guide

Updated:
4/7/2014

Project Name
2014 Reverse Trade Fair

Project Management Team	
Project Sponsor	Steve Sammons (CO-OPP President)
Steering Committee Members	CO-OPP Board of Directors
Project Manager (PM)	Carol Cook (Conference Committee Chair)
PM E-mail Address	carol.l.cook@odh.ohio.gov
PM Phone Number	614-644-6461
Core Project Team Members	Tom Patterson, Mark Evangelista, Melanie Mallett, Diane Ford, Cindy Collins, Bill Kirwin, Barb Johnson, Maureen McGuire
Extended Project Team Members	Conference Committee (responsible for the overall event cohesiveness, supporting other committees as needed, and closeout surveys), Program Committee (responsible for finding event location, demographics, food and beverages, as well as facility setup, issues during the event, and teardown), Public Relations Committee (responsible for marketing to agencies and vendors, event signage/decorations, directory and photography), ICPC (responsible for vendor and agency educational sessions during the event), Strategic Planning Committee (responsible for keynote speaker), Membership Committee (responsible for online vendor and agency registration), Budget and Finance Committee (responsible for documenting receipt of revenue and paying invoices)

1.0 Project Identification and Initiation

Problem or Issue	Need to develop a plan for a profitable and educational 2014 Reverse Trade Fair
How will the Project Address the Problem or Issue	Project will (1) identify critical tasks associated with the Reverse Trade Fair and assign responsibility, (2) monitor progress in accomplishing tasks, (3) record team member, vendor and agency feedback and (4) establish a model for future annual reverse trade fairs.
Expected Deliverables	A half-day event that offers significant value to the vendor community and CO-OPP agencies through educational and promotional opportunities, which will generate revenue in excess of \$50,000.
Goals / Metrics	(1) participation of 300+ vendors and sponsors, (2) participation of 30+ agencies, (3) revenue of \$50,000+, (4) positive feedback from team members, vendors and agencies
Assumptions, Issues, and Risks	Ability to demonstrate value to agencies and vendors; failure to do so will limit agency and vendor participation this year and in future years.
Initial Cost Considerations	Venue (\$\$\$\$), Parking (\$\$\$), Food (\$\$\$\$)
Initial Identification of Funding Source(s)	Approved 2014 CO-OPP Budget (\$12,000)

2.0 Define and Organize the Project

Project Definition	Conduct a successful half-day reverse trade fair event that can be used as a model for future annual events.			
Related Projects and Programs	Activities of all Standing and Ad-Hoc Committees			
Within Scope				
Outside of Scope				
Flexibility Matrix		<i>Least Flex</i>	<i>Moderate Flex</i>	<i>Most Flex</i>
	Scope			x
	Schedule	x		
	Resources		x	
Success Criteria	(1) participation of 300+ vendors and sponsors, (2) participation of 30+ agencies, (3) revenue of \$50,000+, (4) positive feedback from team members, vendors and agencies, (5) project can be easily duplicated in future years.			
Establish Project Communication Plan (Google Site, Project Notebook, etc. / rigor of process and updates)	Primary means of communication = e-mail; In-Person communication through monthly Board meetings, regular Conference Committee meetings, and quarterly Steering Committee meetings.			

3.0 Plan the Project

Host Planning Workshop with Steering Committee, Core and Extended Team	March 18, 2014 - immediately following general membership meeting (30-minutes)			
Develop Work Breakdown Schedule (WBS)				
Develop Preliminary Schedule (Update Project Charter and Planning Guide as needed)	Key Milestone	Responsibility	Start Date	End Date
	Obtain Sponsor and Steering Committee support	Tom	2/26/2014	3/14/2014
	Initial internal marketing material	Mark/Mel	3/5/2014	3/18/2014
	Establish event date and location	Cindy	3/14/2014	4/18/2014
	Develop New Revenue Options	Steve/Mo/Tom	3/14/2014	6/1/2014
	Core Project Team Member Conference Call	Carol	4/18/2014	4/18/2014
	Promote Agency Registration	Mark/Mel	4/21/2014	Event Date

complete

complete

in-progress

in-progress

	Keynote Speaker	Barb	4/21/2014	Event Date
	Educational Sessions	Bill	4/21/2014	Event Date
	Coordinate Food and Facility Needs	Cindy	4/21/2014	Event Date
	Pay invoices	Mo	4/21/2014	Event Date
	Agency Registration	Diane/Tom	5/1/2014	Event Date
	Core Project Team Member Conference Call	Carol	5/16/2014	5/16/2014
	Promote Vendor Registration	Mark/Mel	5/19/2014	Event Date
	Vendor Registration	Diane/Tom	6/1/2014	Event Date
	Track Revenue	Mo	6/1/2014	Event Date
	Develop Directory	Mark/Mel	6/1/2014	Event Date
	Marketing, Marketing and More Marketing	Mark/Mel	6/1/2014	Event Date
	Go Live	All	Event Date	Event Date
Reassess Risks				
Identify Preventative Actions and Contingency Plans				
4.0 Track and Manage the Project				
Monitor Project Status to Ensure it Aligns with the Project Plan	Tentative Venue = The Ohio 4-H Center (\$1,175 venue cost, free parking); Tentative Date = October 8.			
Proactive Management of Issues, Changes and Risks (take adaptive action as needed - CHANGES IN PROJECT COST OR TIME REQUIRE SPONSOR APPROVAL)				
Manage Communication Process to ensure stakeholders are being updated as appropriate	E-mail communications: 3/7 (Board agenda items), 3/7 (project charter and planning guide), 3/19 (reverse trade fair potential venue), 3/20 (reverse trade fair steering committee), 3/28 (reverse trade fair flyers for distribution through ICPC), 4/1 (reverse trade fair decision elements), 4/7 (reverse trade fair update for Conference Committee), 4/7 (Board agenda items). In-Person communications: 3/13 (Board adopts project charter and planning guide); 3/21 (RTF flyer distributed to general membership); 3/21 (Steering Committee meeting #1).			
5.0 Close-out the Project				
Close-out Punch List Items and Open Tasks				
Conduct Close-out Review Workshop				