UNIVERSIDAD PARA LA COOPERACION INTERNACIONAL
(UCI)

TO DEVELOP A PROJECT MANAGEMENT PLAN TO EXECUTE AN
ORGANISATIONAL STRATEGY TO RESTRUCTURE AND REBRAND THE
FOUNDATION FOR NATIONAL DEVELOPMENT ENTERPRISE CO-OPERATIVE
CREDIT UNION IN SAINT KITTS AND NEVIS

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FINAL GRADUATION PROJECT SUBMITTED IN PARTIAL FULFILLMENT OF
THE REQUIREMENTS FOR THE
MASTER IN PROJECT MANAGEMENT (MPM) DEGREE

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This Final Graduation Project was approved by the University as
partial fulfillment of the requirements to opt for the
Master in Project Management (MPM) Degree

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DEDICATION

This thesis is dedicated to all Credit Unions and Co-operatives and the unbanked, underserved communities, which they exist to serve, to help them access necessary financial services.

ACKNOWLEDGMENTS

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ABBREVIATIONS AND ACRONYMS

- CPI – Cost Performance Index
- CIDA – Canadian International Development Agency
- ECCU – Eastern Caribbean Currency Union
- FND – Foundation for National Development
- FNDECCU – Foundation for National Development Enterprise Co-operative Credit Union
- FGP – Final Graduation Project
- M&E – Monitoring and Evaluation
- PMBOK – Project Management Book of Knowledge
- PMI – Project Management Institute
- SDGs - Sustainable Development Goals
- SOW – Statement of Work
- SPI – Schedule Performance Index
- USAID - United States Agency for International Development
- WBS – Work Breakdown Structure

EXECUTIVE SUMMARY (ABSTRACT)

This document outlines the development of a project management plan for the rebrand and complete restructuring of the Foundation for National Development Enterprise Co-operative Credit Union (FNDECCU). Special focus is placed on improved project execution by adopting a project management methodology that may be applied to future projects that the credit union undertakes.

The FNDECCU is a local member-based financial institution that delivers sustainable impact to the communities it serves through offering affordable, accessible, and innovative financial products and services.

The principles of growing wealth and providing financial education for its members are fundamental to the FNDECCU's approach to community development. It achieves this by offering competitive rates on saving, lending, indemnity and investing products.

In the 1980s, FNDECCU gained the respect and trust of the population of St. Kitts and Nevis as a primary source of financial support for a striving small business community

Historically, FNDECCU operated as an organisation that catered primarily to the needs of small businesses in St Kitts and Nevis, to provide well needed Seed (start-up) funding, in an era where banks and other lending institutions were unwilling to lend to new businesses. In the 1980s, FNDECCU gained the respect and trust of the population of St. Kitts and Nevis as a primary source of financial support for a striving small business community. In 2020, however, there are various alternative sources of funding available that promote and encourage entrepreneurship, which essentially makes FNDECCU's primary benefits irrelevant and redundant.

Similarly, to several organisations St. Kitts and Nevis, FNDECCU failed to continuously improve through innovation and creativity. The FGP explores how, through the application of various tools of project management, how the can be transformed to better serve the financial needs of the banked and unbanked in a highly competitive environment.   This project plan provides a comprehensive plan for restructuring and a blueprint that can easily be applied to like entities that require methodical management of a radical organisational change to remain relevant.

The general objective of the FGP was to develop a Project Management Plan to execute an al strategy to restructure and rebrand the FNDECCU.

Specific objectives were achieved including (a) the creation of a comprehensive project charter that outlines how the project will be executed, (b) construction of a scope management plan to ensure that the project deliverables are clearly defined and detailed, (c) drafting of a schedule management plan to ensure that

restructuring of the FNDECCU is done within the preapproved times, (d) creation of cost management plan for assigning costs to work packages, (e) creation of a quality management plan which ensured that the project meets quality requirements,(f) devising a human resource management plan for assigning resources to work packages, (g) development of a sustainable communications management plan for clearly defining the project communication strategies and line of reporting authority, (h) the creation of a risk management plan to identify, prioritize risks in order to plan risk responses throughout the FNDECCU rebranding process, (i) the development of a procurement management plan for identifying and assigning contracts to suppliers to provide the requisite goods and services, (j) the creation of a stakeholder management plan that identifies, defines and categorizes key stakeholders and their unique requirements and expectations and (k) the development of an implementation plan.

The methodology used for this research were a combination of descriptive, qualitative, quantitative and a causal data survey was performed and the data analyzed for the development of a methodological solution by analyzing the existing processes and existing financial performance data, identifying strategies, and practical solutions to manage radical change within a financial institution.

One of the main findings was the need to manage non-for-profit projects with for profit principles to ensure maximum efficiency and efficacy. The FGP outlines how through the creation of a comprehensive Project Management Plan for its first internally managed project, FNDECCU can continuously use the framework to innovate while remaining true to its core principles of being a not-for-profit organisation.

Additionally, as FNDECCU grows it is expected that more projects will be required through the growth phase which includes; an additional location, technological improvements such as the implementation of an ATM card machine, a new website etc. which will require project management to ensure that the credit union's resources are used wisely.

The successful implementation of FNDECCU's Project Management Plan includes extensive human resource management intervention as the success of the project will be driven by a bottom up approach. It is recommended that FNDECCU facilitates capacity building, education, and ongoing communication to train all staff in the use of effective project management practices.

Furthermore, it is proposed that through this project, the FNDECCU can adopt best practices for improving its procurement processes as well as use procurement as an opportunity to focus on high efficiency for general operational processes.

1   INTRODUCTION

From this section on, 1.5-line spacing must be used. Page numbering must be in Arabic numerals located on the upper right corner of each page.

1.1.   Background

The Foundation for National Development (FND) opened its doors in 1985. As a not-for-profit entity with funding provided by CIDA & USAID, the institution's purpose was to provide small businesses with financing, technical assistance, and operational training, thereby bridging the funding gap between the commercial banks and micro businesses/entrepreneurs.   To provide additional support to micro businesses, the FND guaranteed loans made by traditional credit sources (Banks and Credit Unions). FND's regular clientele included farmers, fishermen, hair stylists, truckers, motor mechanics, store owners etc.

In response to economic trends and changes in demand from members, in 2009 FND moved forward to become a credit union and became FND Enterprise Co-operative Credit Union Limited. The FND Enterprise Co-operative Credit Union adapted the mission "building financially stronger communities by safeguarding members' investment and exceeding member expectations through professional, convenient and courteous service."

In 2020, with rapidly changing demands for more accessible and readily available financial services to its members and a segment of the unbanked population, FNDECCU now seeks to be restructured and rebranded to respond to the new financial climate and ultimately create more value for its members. At the end of the restructuring process, FNDECCU will be renamed First Federal Co-operative Credit Union ltd (First Federal).

1.2.   Statement of the problem

Historically, FNDECCU operated as an organisation that catered primarily to the needs of small businesses in St Kitts and Nevis, to provide well needed seed

(start-up) funding, in an era where banks and other lending institutions were unwilling to lend to startups. In the 1980s, FNDECCU gained the respect and trust of the population of St. Kitts and Nevis as a primary source of financial support for a striving small business community. In 2020, however, there are various alternative sources of funding available that promote and encourage entrepreneurship, which essentially makes FNDECCU's primary benefits irrelevant and redundant.

After a brief consultation with the CEO, it was discovered that since its inception 25 years ago, FND has conducted numerous projects, but has never developed or adopted any project management methodology. This has caused inconsistent planning, inadequate estimations, poor communication, ultimately causing projects to lag and to be poorly executed in some instances. It is apparent, that to continue to serve the needs of the people of St. Kitts and Nevis, FNDECCU must evolve and widen its suite of product and services, establish a new mission, vision, and overall mandate.

As an institution operating within a competitive environment, there are many challenges faced throughout the transformation of the FNDECCU since its first attempt of restructuring in 2009. FNDECCU, although changed in its offerings, was still only perceived as a financial institution that provided funding for small businesses.   Therefore, the products and services offered were severely underutilized, resulting in inadequate membership

This project management plan is intended to restructure and rebrand the FNDECCU to be one of the premier financial institutions in St. Kitts and Nevis, providing personalized services in an inclusive environment that caters to a wide-cross section of people.

Opportunity to be seized

Primarily, using project management to guide the change process for FNDECCU's rebrand and restructuring will establish a template for the execution of future projects and continuous improvement to daily processes.

This project will help to build on the principles that were originally established by founders of FNDECCU - an organisation that exists primarily to meet the needs of those that typically are averse to traditional banking through commercial banks. This project will also enable the FNDECCU, through its rebrand, to reach out to the unbanked population, therefore providing essential financial services, encouraging thrift and facilitating financial education.

Through the rebranding and restructuring FNDECCU is expected to achieve many major undertakings, which include:

1. Name change.
2. Change of logo, brand colours, mission and vision statements.
3. New website and social media presence.
4. Improvement of operations through enhanced processes.
5. Restructuring through retrenchment.
6. Creation of a comprehensive project charter that outlines how the project will be executed
7. Development of a scope management plan to ensure that the project deliverables are clearly defined and detailed.
8. Creation of a time management plan to ensure that restructuring of the FNDECCU is done within the preapproved times.
9. Creation of a cost management plan for assigning costs to work packages.
10. Creation of a quality management plan, which ensured that the project meets quality requirements.

11. Development of a human resource management plan for assigning resources to work packages.
12. Development of a sustainable communications management plan for clearly defining the project communication strategies and line of reporting authority.
13. Creation of a risk management plan to identify, prioritize risks to plan risk responses throughout the FNDECCU rebranding process.
14. Development of a procurement management plan for identifying and assigning contracts to suppliers to provide the requisite goods and services
15. Creation of a stakeholder management plan that identifies, defines, and categorizes key stakeholders and their unique requirements and expectations.

By implementing the deliverables of the proposed Final Graduation Project (FGP), the FNDECCU will be better prepared to emerge as First Federal Co-operative Credit Union (FFCCU), to offer a wide array of financial products and services in a creative and innovative way.

1.3. Purpose

Several organisations and entities in St. Kitts and Nevis fail to continuously improve through innovation and creativity. The main purpose of the project is to explore how, through the application of various tools of project management, that an organisation like FNDECCU can be transformed to better service the financial needs of the banked and unbanked in a highly competitive environment. This study will investigate the intricacies and complexities of managing an al change process within the not-for-profit environment and how Project Management can facilitate this in an efficient way.

Developing this comprehensive project management plan will guide the restructuring of the FNDECCU. Some of the key benefits to be derived from the project are:

1. The creation of a guideline that may be adopted throughout the financial industry to manage radical al change.
2. The opportunity to apply a tailored plan to better position itself within a highly competitive market.
3. FNDECCU will also have a blueprint to implement future projects in an effective manner.

1.4. General objective

To develop a Project Management plan to execute an al strategy to restructure and rebrand the Foundation for National Development Enterprise Co-operative Credit Union (FNDECCU) in Saint Kitts and Nevis.

1.5. Specific objectives

Objective 1: To develop a project management plan that details guidelines to restructure and rebrand FNDECCU through the creation of subsidiary plans including; a project integration plan, scope management plan, time management plan, cost management plan, quality management plan, human resource management plan, communications management plan, risk management plan, procurement management plan and a stakeholder management plan.

Objective 2: To develop a strategic implementation plan which emcompasses the following short, medium and long term actions;

- Short-term - Identifying and satisfying the needs of the stakeholders through utilizing information technology, applying best management practices for executing the project management plan at the point of initiation throughout the project life cycle.
- Medium: Utilizing a kick-off meeting which prioritizes and sets defined goals and deliverables, along with weekly follow up meetings that mark project

milestone success in order to manage risks, minimize delays and stay within the project budget.

- Long-term: Building on processes introduced in the project management plan and implementing the improved systems and processes and capacity building during the closing phase of the project to meet the predefined metrics for project success.

2 THEORETICAL FRAMEWORK

- ✓ Every chapter, but this one in particular, should use APA[1] style to credit sources by correctly citing references. No textual cites must be included without proper citation.
- ✓ It is not a summary of cites, it must be written by the student using appropriate cites as needed.
- ✓ Should include charts, figures, graphs as needed to facilitate its reading. Remember that charts, figures and graphs must be numbered in a consecutive way.
- ✓ Charts must be numbered and named on their upper section whilst figures and graphs must be numbered and named on their lower section.
- ✓ For charts, figures and graphs, sources should be included following APA style.
- ✓ Charts and figures must be in English language.

2.1 Company/Enterprise framework

Must be subdivided in sections with the corresponding titles as shown below.

Must not be a copy of section 1.1 Background from chapter 1.

2.1.1 Company/Enterprise background

The co-operative and mutual enterprise business model represents a unique type of that has a dual purpose focused on both economic and social goals. For nearly

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[1] Publication Manual of the American Psychological Association.

two centuries it has played an important role in economic development, job creation and addressing market failures. However, despite its potential importance to economic development co-operatives have been largely ignored within the mainstream economics and management literature.

FNDECCU is a member-based non-profit financial institution that enables its members to gain financial stability by exercising thrift, prudent borrowing, and access to financial counselling. The FND Credit Union is people oriented and operated for 10 years under the motto "We Profit For You, Not From You!"

FNDECCU's financial services are available to any individual or group residing in St. Kitts and Nevis who joins the institution. Transformed in 2009, the FNDECCU serves over 870 members.

2.1.2 Mission and vision statements

After the 10th Annual General Meeting of the FNDECCU, the shareholders voted to change the mission and vision statement to reflect the new strategic direction of the organisation. Upon beginning the restructuring process, in October 2019, the new mission that was established is: Fostering the financial growth of a community of members by encouraging thrift, designing custom tailored products and creating wealth. The creation of FNDECCU's Project Management Plan for restructuring will be guided by this mission.

The vision statement was adopted at the first Board of Directors meeting upon election of the new board. The vision statement devised was: Making financial success first nature.

2.1.3 Organisational structure

The organisation has grown over the years in management structure, and can be described as top-heavy, while the staff complement has remained the same. While the decision to restructure, has resulted in sentiments to revamp existing

processes and staff assignments, the general organisational structure remains. Figure 1 illustrates the current organisational structure.

Describe the company/enterprise organizational structure. It might be helpful to use a Figure.

This element can be related to the areas or the organization which might be impacted by the FGP.
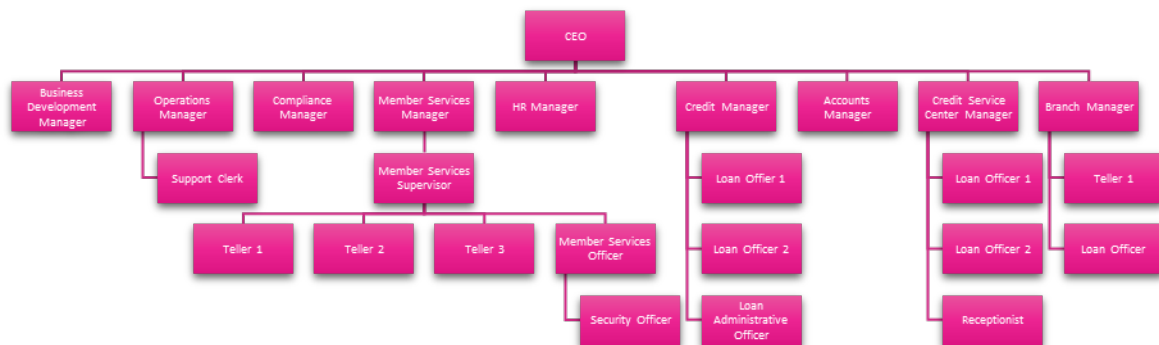
Figure 1 Organisational structure (Source: FND Credit Union Annual Report 2018)

2.1.4   Products offered

FNDECCU offers a suite of products in the following general categories;

- Savings

- Personal Loans

- Business Loans

- Checking Accounts

- Investment Products

- Family Indemnity Plans

- Credit Insurance

2.2   Project Management concepts

Must indicate the main project management concepts, such as project, project management, project life cycle, knowledge areas, project management processes, process groups, and any other applicable project management related concepts.

Must include the relationship of these concepts with the topics to be developed for the FGP, as well as with the company/enterprise context. For example: if the company has its own project life cycle, it should be presented on this section, after the generic project life cycle definition.

Remember to use APA style cites as needed for every bibliographical source used.

2.2.1   Project

A Project is defined as a temporary endeavour undertaken to create a unique product, service, or result. (Project Management Institute, 2017).

The FNDECCU has moved to undertake a major restructuring but has not implemented the change through a structured project format. There is flexibility because of the lack of structure and time constraints with the overall restructuring and rebranding, however, a pervasive lack of focus and productivity also exists. As such, project execution has been limited to the context of a mere rebrand, instead of an overall restructuring process which will allow for a radical transformation.

2.2.2 Project management

Project Management is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements. (PMI, 2017) It is imperative that the FNDECCU adopts a comprehensive project management plan. A project management plan is essential for several reasons; it ensures that projects run smoothly and according to a plan, while being delivered on time and on budget. Presently, the FNDECCU has no timeline or budget put in place for the restructuring process.

It is also very important for project management to be at the heart of FNDECCU's restructuring exercise as it will create a standardized approach to achieving project objectives. Each stakeholder (internal and external) should have a mutual understanding of the project objectives. By an extension, each stakeholder should understand their roles in achieving those objectives. Furthermore, putting together a project team will be a major enabler for the execution of the exercise. The project team ought to be empowered to manage time, costs, and risks efficiently.

Essential elements of the project management plan are:

- Identification of stakeholder's needs.
- Smart project objectives.
- Clear deliverables and deadlines.
- A detailed project schedule.
- Clearly defined roles.
- Project costs.
- A communication plan.
- The right systems and processes.

2.2.3 Project life cycle

The Project Life Cycle is described as "the series of phases that a project passes through from its initiation to its closure" (PMI, 2017). The project life cycle consists

of four distinct phases: initiation, planning, execution, and closure. (PMI, 2017). FNDECCU does not have a project life cycle in place, however the restructuring and rebranding procedures proposed herein requires for a project life cycle to be created in order to achieve project deliverables.

The following figure shows the model project life cycle which can be applied to the FNDECCU through its restructuring process as can be pictured in the figure 2.
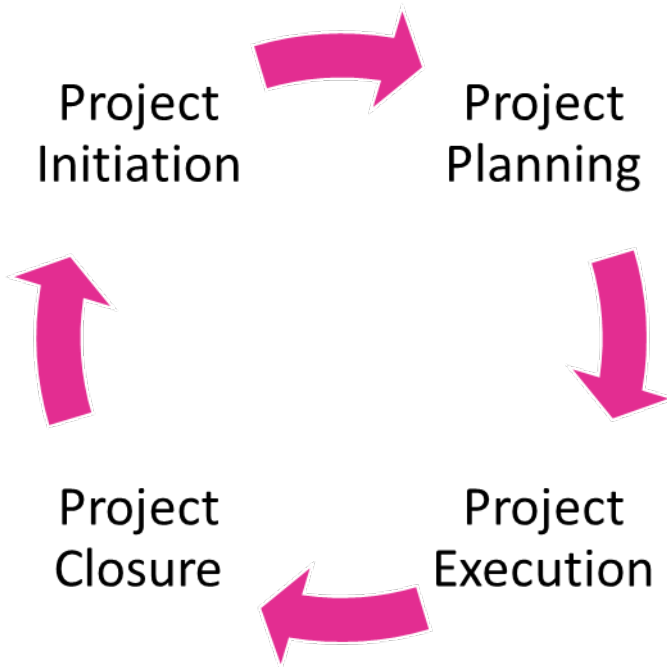
Figure 2 Project lifecycle (Source: PMBOK Guide)

2.2.4 Project management processes

The PMBOK Guide 6th Edition defines project management processes as operations that ensure the effective flow of the project throughout its life cycle. (PMI, 2017). These project management process groups consist of the series of phases that include initiating, planning, executing, monitoring and controlling, and closing) which draw on ten (10) knowledge areas. Although the FNDECCU has yet to adopt these processes (or any of the 10 knowledge areas) as part of its operations, it is expected that the FGP can contribute to formalizing these processes going forward, through the structuring process and beyond.

2.2.5   Project management knowledge areas

As stated above, there are ten (10) knowledge areas used in project management. FNDECCU has never applied these knowledge areas to the application of project implementation; however, it is clear that some of these have been performed de facto. These are:

- Perform project initiation to create a comprehensive project charter that outlines how the project will be executed.
- Construct a scope management plan to ensure that the project deliverables are clearly defined and detailed.
- Draft a time management plan to ensure that restructuring of FNDECCU is done within the preapproved times.
- Create a cost management plan for assigning costs to work packages.
- To create a quality management plan which ensures that the project meets quality requirements.
- To create a human resource management plan to optimize resources.
- To develop a sustainable communications management plan for clearly defining the project communication strategies, reporting structure and issue escalation.
- To create a risk management plan to identify, prioritize risks to plan risk responses throughout the FNDECCU rebranding process.
- To develop a procurement management plan for identifying and assigning contracts to suppliers to provide the requisite goods and services.
- To create a stakeholder management plan that identifies, defines and categorizes key stakeholders and their unique requirements and expectations.

3   METHODOLOGICAL FRAMEWORK

- Information sources, research methods, tools, assumptions, constraints and deliverables are explained on this chapter.

- Remember to use APA style cites as needed for every bibliographical source used.

3.1 Information sources

- Must include the definition of information sources, using APA style cites as needed.

3.1.1 Primary sources

Primary sources are original materials. They are from the time involved and have not been filtered through interpretation or evaluation. Primary sources are original materials on which another research is based. They are usually the first formal appearance of results in physical, print, or electronic format. They present original thinking, report a discovery, or share new information. The definition of a primary source may vary depending upon the discipline or context. (Library and Information Science, 2016)

Primary sources to be used for the purpose of this FGP are website, minutes of meetings, interviews, press releases, newspaper articles, observation, photographs, books, advertisements published at the time, and annual reports.

3.1.2 Secondary sources

Secondary sources are less easily defined than primary sources. Generally, they are accounts written after the fact with the benefit of hindsight. They are interpretations and evaluations of primary sources. Secondary sources are not evidence, but rather commentary on and discussion of evidence. However, what some define as a secondary source, others define as a tertiary source. The definition of a secondary source may vary depending upon the discipline or context. (Library and Information Science, 2016)

Secondary sources that are used for the FGP include: Previous Research, letters, regulator reports, web Information, historical data and information, reference

books, articles from magazines, journals, literature reviews, textbooks, manuals, abstracts.

All the sources are listed in the chart 1 below.

Chart 1 Information sources

Objectives	Information sources	
	Primary	**Secondary**
Perform project initiation to create a comprehensive project charter that outlines how the project will be executed.	Website, minutes of meetings, interviews, press releases, newspaper articles and annual reports	Previous Research, letters, regulator reports, web Information, historical data and information, reference books, articles from magazines, journals, literature reviews, textbooks, manuals, abstracts.
Construct a scope management plan to ensure that the project deliverables are clearly defined and detailed.	Website, minutes of meetings, interviews, press releases, newspaper articles, observation, photographs, books, advertisements published at the time, and annual reports.	Previous Research, letters, regulator reports, web Information, historical data and information, reference books, articles from magazines, journals, literature reviews, textbooks, manuals, abstracts.
Draft a time management plan to ensure that restructuring of FNDECCU is done within the preapproved times.	Website, minutes of meetings, interviews, press releases, newspaper articles, observation, photographs,	Previous Research, letters, regulator reports, web Information, historical data and information, reference books, articles from magazines, journals, literature reviews, textbooks, manuals, abstracts.

	books, advertisements published at the time, and annual reports.	
Create a cost management plan for assigning costs to work packages	Annual Reports, Audited Financial Statements	Previous Research, regulator reports, web Information, historical data and information, reference books.
Create a quality management plan which ensures that the project meets quality requirements	Website, minutes of meetings, interviews, press releases, newspaper articles, observation, photographs, books, advertisements published at the time, and annual reports.	Previous Research, letters, regulator reports, web Information, historical data and information, reference books, articles from magazines, journals, literature reviews, textbooks, manuals, abstracts.
Create a human resource management plan for assigning resources to work packages	Website, minutes of meetings, observation, photographs, books, and annual reports.	Previous Research, letters, regulator reports, web Information, historical data and information, reference books, articles from magazines, journals, literature reviews, textbooks, manuals, abstracts.
Develop a sustainable communications management plan for	Website, minutes of meetings, interviews, press	Previous Research, letters, regulator reports, web Information, historical data and information, reference

defining clearly the project communication strategies and line of reporting authority.	releases, newspaper articles, observation, photographs, books, advertisements published at the time, and annual reports.	books, articles from magazines, journals, literature reviews, textbooks, manuals, abstracts.
Create a risk management plan to identify, prioritize risks in order to plan risk responses throughout the FNDECCU rebranding process.	Website, minutes of meetings, interviews, press releases, newspaper articles, observation, photographs, books, advertisements published at the time, and annual reports.	Previous Research, letters, regulator reports, web Information, historical data and information, reference books, articles from magazines, journals, literature reviews, textbooks, manuals, abstracts.
Develop a procurement management plan for identifying and assigning contracts to suppliers to provide the requisite goods and services	Annual Reports, Audited Financial Statements.	Previous Research, regulator reports, textbooks, manuals, abstracts.

Create a stakeholder management plan that identifies, defines and categorizes key stakeholders and their unique requirements and expectations	Website, minutes of meetings, interviews, press releases, newspaper articles, observation, photographs, books, advertisements published at the time, and annual reports.	Previous Research, web Information, reference books, articles from magazines, journals, literature reviews, textbooks, manuals, abstracts.

(Source: Author of the FGP)

3.2   Research methods

3.2.1 Qualitative research

Bishwajit, Pathik and Maryam (2014) describes Qualitative research as being concerned with the individual's personal experiences of the problem under study. It is the collection, analysis, and interpretation of data by observing what people do and say. It refers to the meanings, concepts, definitions, characteristics, metaphors, symbols, and descriptions of things. Contrarily, quantitative research refers to counts and measures of things.

3.2.2   Quantitative research

Quantitative research usually involves collecting and converting data into numerical form so that statistical calculations can be made to draw conclusions. Quantitative research is an inquiry into an identified problem, based on testing a theory, measured with numbers, and analyzed using statistical techniques. The goal of quantitative methods is to determine whether the predictive generalizations of a theory hold true. (Bishwajit, Pathik and Maryam, 2014)

3.2.3 Descriptive research

Descriptive research can be used to describe a unit of analysis, e.g., a case study of an organisation, or to describe a research method. It is used to identify and obtain information on the characteristics of a particular problem or issue. (Bishwajit, Pathik and Maryam, 2014)

3.2.4 Causal research

Causal research explores the effect of one variable on another. It represents the comparative study which is used to measure the impact of a specific change upon an existing system. (Bishwajit, Pathik and Maryam, 2014)

All the methods are listed in the following chart 2.

Chart 2 Research methods

Objectives	Research methods			
	Qualitative	Quantitative	Descriptive	Causal
Perform project initiation to create a comprehensive project charter that outlines how the project will be executed.	This method examines various modules of this knowledge area; is a basis for research offers indication of how and why decisions are made about project	This unbiased, methodical sampling method analyses statistical records to describe variables to determine contributory proceedings between	This method will provide a thorough explanation of the numerous components of the scope management plan, as they presently exist.	Compares and measures the impact of a specific change upon an existing system.

	initiation.	causal scope factors and to facilitate the best projections of future outcomes in this knowledge area.		
Construct a scope management plan to ensure that the project deliverables are clearly defined and detailed.	This method examines various modules of this knowledge area; is a basis for research offers justification for key decision making elements for development of the scope management plan.	This unbiased, methodical sampling method analyses statistical records to describe variables to determine contributory proceedings between causal scope factors and to facilitate the best projections	This method will provide a thorough explanation of the numerous components of the scope management plan, as they presently exist.	Compares and measures the impact of a specific change upon an existing system

		of future outcomes in this knowledge area.		
Draft a time management plan to ensure that restructuring of FNDECCU is done within the preapproved times.	This method examines various modules of this knowledge area; is a basis for research offers justification for key decision-making elements for time management.	This unbiased, methodical sampling method analyses statistical records to describe variables to determine contributory proceedings between causal scope factors and to facilitate the best projections of future outcomes in this knowledge area.	This method will provide a thorough explanation of the numerous components of the scope management plan, as they presently exist.	Compares and measures the impact of a specific change upon an existing system.
Create a cost	This method	This	This method	Compares

management plan for assigning costs to work packages.	examines various modules of this knowledge area; is a basis for research offers justification for key decision-making elements for cost management.	unbiased, methodical sampling method analyses statistical records to describe variables to determine contributory proceedings between causal cost factors and to facilitate the best projections of future outcomes in this knowledge area.	will provide a thorough explanation of the numerous components of the scope management plan, as they presently exist.	and measures the impact of a specific change upon an existing system.
Create a quality management plan which ensures that the project meets quality requirements.	This method examines various modules of this knowledge area; is a basis for research	This unbiased, methodical sampling method analyses statistical records to	This method will provide a thorough explanation of the numerous components of the scope	Compares and measures the impact of a specific change upon an

	offers justification for key decision-making elements for quality management.	describe variables to determine contributory proceedings between causal quality factors and to facilitate the best projections of future outcomes in this knowledge area.	management plan, as they presently exist.	existing system.
Create a human resource management plan for assigning resources to work packages.	This method examines various modules of this knowledge area; is a basis for research offers justification for key decision-making elements for resource	This unbiased, methodical sampling method analyses statistical records to describe variables to determine contributory proceedings between	This method will provide a thorough explanation of the numerous components of the scope management plan, as they presently exist.	Compares and measures the impact of a specific change upon an existing system.

	management.	causal factors and to facilitate the best projections of future outcomes in this knowledge area.		
Develop a sustainable communications management plan for defining clearly the project communication strategies and line of reporting authority.	This method examines various modules of this knowledge area; is a basis for research offers justification for key decision-making elements for communication management.	This unbiased, methodical sampling method analyses statistical records to describe variables to determine contributory proceedings between causal factors and to facilitate the best projections of future outcomes in	This method will provide a thorough explanation of the numerous components of the scope management plan, as they presently exist.	Compares and measures the impact of a specific change upon an existing system

		this knowledge area.		
Create a risk management plan to identify, prioritize risks in order to plan risk responses throughout the FNDECCU rebranding process.	This method examines various modules of this knowledge area; is a basis for research offers justification for key decision-making elements for risk management.	This unbiased, methodical sampling method analyses statistical records to describe variables to determine contributory proceedings between causal factors and to facilitate the best projections of future outcomes in this knowledge area.	This method will provide a thorough explanation of the numerous components of the scope management plan, as they presently exist.	Compares and measures the impact of a specific change upon an existing system
Develop a procurement management plan for	This method examines various modules of this	This unbiased, methodical sampling	This method will provide a thorough explanation	Compares and measures the impact

identifying and assigning contracts to suppliers to provide the requisite goods and services.	knowledge area; is a basis for research offers justification for key decision-making elements for project procurement.	method analyses statistical records to describe variables to determine contributory proceedings between causal factors and to facilitate the best projections of future outcomes in this knowledge area.	of the numerous components of the scope management plan, as they presently exist.	of a specific change upon an existing system
Create a stakeholder management plan that identifies, defines and categorizes key stakeholders and their unique requirements and	This method examines various modules of this knowledge area; is a basis for research offers justification for key decision-	This unbiased, methodical sampling method analyses statistical records to describe variables to determine	This method will provide a thorough explanation of the numerous components of the scope management plan, as they presently	Compares and measures the impact of a specific change upon an existing system.

expectations.	making elements for stakeholder management.	contributory proceedings between causal factors and to facilitate the best projections of future outcomes in this knowledge area.	exist.	

(Source: Author of the FGP)

3.3 Tools

Tool is defined as "something tangible, such as a template or software programme, used in performing an activity to produce a product or result." (PMI, 2013)

All the tools used are listed in the chart 3.

Chart 3 Tools used for FGP

Objectives	Tools

Construct a scope management plan to ensure that the project deliverables are clearly defined and detailed.	Expert Judgment
	Meetings
	Collect Requirements
	  Focus Groups
	  Group Decision-making techniques

	Document Analysis
	Define
	Expert Judgment
	Facilitated Workshops
	Create WBS
	Decomposition
	Expert Judgment
	Validate
	Inspection
	Group Decision-making Techniques
	Control
	Variance Analysis
Draft a time management plan to ensure that restructuring of FNDECCU is done within the preapproved times.	Plan Schedule Management
	Expert Judgment
	Define Activities
	Decomposition
	Rolling Wave Planning
	Expert Judgment
	Sequence Activities
	Dependency Determination
	Estimate Activity Durations
	Expert Judgment
	Reserve Analysis
	Develop Schedule
	Critical Path
Create a cost management plan for assigning costs to work packages.	Plan Cost Management
	Expert Judgment
	Meetings
	Estimate Costs
	Expert Judgment
	Bottom-up estimating

	Determine Budgets
	Cost Aggregation
	Reserve Analysis
	Expert Judgment
	Control Costs
	Reserve Analysis
Create a quality management plan which ensures that the project meets quality requirements.	Plan Quality Management Cost Benefit Analysis Brainstorming Control Quality Management Cause and Effect Diagrams Check Sheets Benchmarking Quality Assurance Activity Network Diagram
Create a human resource management plan for assigning resources to work packages.	Organisational Charts Responsibility Assignments Matrix Text Networking Organisational Theory Expert Judgement SWOT Analysis

Develop a sustainable communications management plan for defining clearly the project communication strategies and line of reporting authority.	Plan Communications Communication Requirements Analysis Communication Methods Manage Communications Communication Methods Control Communications Expert Judgment
Create a risk management plan to identify, prioritize risks in order to plan risk responses throughout the FNDECCU rebranding process.	Brainstorming SWOT Risk Register Probability and Impact Matrix
Develop a procurement management plan for identifying and assigning contracts to suppliers to provide the requisite goods and services	Plan Make or buy analysis Conduct Contracts Negotiations Control Close Procurement Audits

Create a stakeholder management plan that identifies, defines and categorizes key stakeholders and their unique requirements and expectations	Identify Stakeholders
	  Stakeholder Analysis
	  Expert Judgment
	  Meetings
	Plan Stakeholder Management
	  Expert Judgment
	  Meetings
	  Analytical Techniques

	Manage Stakeholder Engagement
	Communication Methods
	Interpersonal Skills
	Management Skills
	Control Stakeholder Engagement
	Expert Judgment Meetings

(Source: Author of the FGP)

3.4   Assumptions and constraints

3.4.1   Assumptions

According to PMBOK® Guide Sixth Edition, Project Assumption is "A factor in the planning process that is considered to be true, real or certain often without any proof or demonstration". PMBOK Guide – Sixth Edition (2017).

3.4.2   Constraints

A **constraint** is defined as "a limiting factor that affects the execution of a project, programme, portfolio, or process." PMBOK Guide – Sixth Edition (2017).

In chart 4 all the assumptions and constraints are listed.

Chart 4 Assumptions and constraints

Objectives	Assumptions	Constraints
Objective 1: To develop a project management plan that details guidelines to restructure and rebrand FNDECCU through the creation of subsidiary plans including; a project integration plan, scope management plan, time	• It is assumed that the work to be accomplished, as will be identified by stakeholders, will be adequately catered for in this plan. • It is assumed that the work undertaken in this plan will be adopted. • It is assumed that the full scope	• Quality is limited by budget allocations. • Staff operating from different geographic locations (three branches) • Aversion to

Objectives	Assumptions	Constraints
management plan, cost management plan, quality management plan, human resource management plan, communications management plan, risk management plan, procurement management plan and a stakeholder management plan. Objective 2: To execute an action plan which encompasses the following actions: • Identification of stakeholder's needs. • Smart project objectives. • Clear deliverables and deadlines. • A detailed project schedule. • Clearly defined roles. • Project costs. • A communication plan. • Implementation of	of the project is adequate to achieve the goals of FNDECCU. • It is assumed that there is adequate time allocated to complete the project • It is assumed that FNDECCU has sufficient funds to implement the project. • It is assumed that FNDECCU operates within standardized guidelines of financial regulatory rules • It is assumed that FNDECCU has adequate staff resources • It is assumed that FNDECCU budgets for additional resources to meet the needs of the expansion. • It is assumed that there is adequate means to communicate to all stakeholders. • It is assumed that risk that may arise may be managed internally. • It is assumed that all risks will be identified with contingencies put in place.	change • No clear communication channels available. • Lack of risk mitigation plan. • No risk policy or guidelines in place. • Unclear procurement practices. • Stakeholders aversion to change.

Objectives	Assumptions	Constraints
the right systems and processes.	• It is assumed that procurement can be achieved through usual mechanisms within the organisation. • It is assumed that all stakeholders are interested in the successful execution of the project.	

(Source: Author of the FGP)

3.5 Deliverables

A **deliverable** is any unique and verifiable product, result, or capability to perform a service that must be produced to complete a process, phase, or project. PMBOK Guide – Sixth Edition (2017), in chart 5, all the deliveries are listed.

Chart 5 Deliverables

Objectives	Deliverables
Perform project initiation to create a comprehensive project charter that outlines how the project will be executed.	Project Charter
Construct a scope management plan to ensure that the project deliverables are clearly defined and detailed. .	Scope Management Plan
Draft a time management plan to ensure that restructuring of FNDECCU	Time Management Plan

is done within the preapproved times.	
Create a cost management plan for assigning costs to work packages	Cost Management Plan
Create a quality management plan which ensures that the project meets quality requirements	Quality Management Plan
Create a human resource management plan for assigning resources to work packages	Resource Management Plan
Develop a sustainable communications management plan for defining clearly the project communication strategies and line of reporting authority.	Communications Plan
Create a risk management plan to identify, prioritize risks to plan risk responses throughout the FNDECCU rebranding process.	Risk Management Plan
Develop a procurement management plan for identifying and assigning contracts to suppliers to provide the requisite goods and services.	Procurement Management Plan
Create a stakeholder management plan that identifies, defines and categorizes key stakeholders and their unique requirements and expectations	Stakeholder Management Plan

(Source: Author of the FGP)

4 RESULTS

This chapter will be developed with your tutor as part of the tutoring process (not during the graduation seminar).

4.1 Project Integration Management

According to the PMBOK Guide, Project Integration Management includes the processes and activities to identify, define, combine, unify, and coordinate various processes and project management activities within the Project Management Process Groups. (PMI, 2017)

4.1.1 Purpose

FNDECCU has recently approved the rebrand and restructuring project to move forward for project initiation. This project will result in increased members, strong al culture, improved processes, surpluses, and supports its overall organisational strategy providing tailored products and service to its members, which will improve their propensity for financial success. While FNDECCU has served the small business community well over the years, FNDECCU believes that undertaking the rebrand and restructure exercise will enable them to develop far superior service products than what is currently available within St. Kitts and Nevis.

4.1.2 Business Context

FNDECCU aims to be successful in gaining market share because of its aggressive pursuit of product quality, ease of use, flexibility, and personalized member service. Additionally, members understand that their needs are the priority. By leveraging FNDECCU's strong reputation for supporting economic growth of St. Kitts and Nevis through building small to medium sized enterprises, FNDECCU will position itself as the premier provider of tailored banking and financial solutions.

4.1.3 Integration Strategy

The Project Integration Management Processes are:

- Develop a Project Charter using the requirements and expectations communicated by the CEO of FNDECCU.

- Develop a Project Management Plan will be delivered using expert judgment and meetings with key FNDECCU stakeholders.

- Direct and Manage Project Work this will be done by carefully identifying a capable project team and using focus groups intermittently to validate direction.

- Manage Project Knowledge using existing knowledge of FNDECCU founders, senior staff and consultants hired to assist in guiding al change.

- Monitor and Control Project Work through robust project tracking and using the project team to report overall project objectives outlined in the project management plan.

- Perform Integrated Change Control through creating a revision history chart, reviewing, and approving all change requests (see template below)

- Close Project by finalising activities for the project.

4.1.4 Impact Assessment

Through the al change that will occur in implementing the project management plan, there is a need for documenting changing processes are changing and to provide a detailed plan for how each process change will be addressed.

If Business Processes are changing for the Owning Business Office or related Business Offices' provide a detailed plan for how each will be addressed.

4.1.5 Capacity Plan

FNDECCU is a small organisation of only 25 members of staff. A change such as the proposed rebrand and restructure will require manpower and dedicated resources to successfully complete the project. Due to the small complement of staff it is understood that additional resources must be engaged and integrated into the existing resources available. The credit union will seek to hire a business

development consultant to aid in their proposed rebrand and restructuring strategies.

4.2   Scope Management Plan

4.2.1 Introduction

This Scope Management Plan will ensure that the project deliverables are clearly defined and detailed before the project begins to ensure requisite resource allocation, scheduling and budgeting is not extended beyond the activities set out in the restructuring process.   In planning the scope of executing a complex al strategy such as restructuring and rebranding, the organisation will ensure that only the requisite tasks are pursued and that no unauthorized work is included as the project progresses.   Further, through the correct application of scope management processes and tools, tasks or auxiliary work that can be used to enhance the project will be carefully examined and documented to be included in subsequent projects.

The scope of the work to be executed for a restructured and rebranded FNDECCU includes processes for: the efficient planning of and allowance for projected FNDECCU related expenditure; the most representative and timely allocation of resources for an additional location with specific functions and the timely, sustained and representative engagement of FNDECCU stakeholders over the project life.

FNDECCU is a not-for-profit entity, which will provide 100% of the funding for the execution of the rebrand.   The cost to execute the restructuring and rebrand for this period has been estimated at XCD$100,000.00.

The rebranding and restructuring will meet or exceed organisational strategy and the requirements that were established in the Project Charter.   Additionally, the project scope includes the development of any related documentation and manuals to be used as the business continues.   Project completion will occur when the

organisation has been totally transformed and FNDECCU is transitioned to First Federal Co-operative Credit Union with the following:

- Name change
- Rebuild brand identity through redesigning logo and establishing new brand colours
- Change of organisational structure
- Physical enhancement of branches to reflect new brand
- Market repositioning
- Change of policies and manuals
- Redefine mission, vision, and values
- Change of all stationery including bank books, cheques, forms
- New website and social media presence

The scope of the work in this project is limited to the restructure and rebrand of FNDECCU only. No extensive or deliberate work related to expansion with new locations, recruiting, and hiring new staff or the operations of the FNDECCU will be pursued in this project. New process automations including the implementation of an ATM Machine, credit and debit cards, Night Deposits will be pursued as separate projects later.

Most project work will be performed internally, and the technical and production aspects of the project will be outsourced.

4.2.2 Roles and Responsibilities

Roles and responsibilities will be aptly distributed to stakeholders based on their functional role or relationship within the organization, skillset and are of expertise. The roles and responsibilities are detailed below to ensure only approved work is undertaken based on the scope of the project as chart 6 shows.

Chart 6 Scope Management Roles and Responsibilities

Role	Description
Project Sponsor	- Selecting the project manager during the

	initiation phase, and gives the project manager a clear mandate, context for the project and sets the level of their authority. • Defines project roles and reporting structure • Ensures that the project delivers the agreed business benefits and remains a viable business proposition • Gets financial resources • Decision-maker for progress and phases of project • Makes sure the business case is valid and in step with the business proposition • Aligns project with business strategy, goals and objectives • Stays informed of project events to keep project viable • Defines the criteria for project success and how it fits with the overall business • Serves as an escalation path for matters beyond the control of the Project Manager and so is part of the project (management) team • Actively reviews the project and authorizes go/no-go decisions, scope changes and end-phase reviews (especially in the case of high-risk project components) • Provides additional funds for scope change
Project Manager	• Planning and Defining Scope • Activity Planning and Sequencing • Resource Planning • Developing Schedules • Time Estimating • Cost Estimating • Developing a Budget • Documentation • Creating Charts and Schedules • Risk Analysis • Managing Risks and Issues • Monitoring and Reporting Progress • Team Leadership • Strategic Influencing • Business Partnering • Working with Vendors • Scalability, Interoperability and Portability Analysis • Controlling Quality

	• Benefits Realisation
Project Team	• Specifically assigned to work on the project during specific phases or throughout the project duration • May have specific roles for the specialized completion of various administrative or technical tasks as outlined in the project plan • Directed by the Project Manager • In large teams, some may serve as Team Leaders responsible for certain aspects of the project plan / project deliverables • Identifies and escalates policy issues
Consultant	• Business Partnering • Working with Vendors • Scalability, Interoperability and Portability Analysis
Board of Directors	• Provides policy and functional direction, leadership, assists in conflict resolution, and supervision to the project • Resolves issues escalated by the Project Manager or Project Team • Approves project deliverables and scope changes, implementation and work plans, milestones and prioritizes project goals
FNDECCU Members	• Identifies product or service needs • Participates in defining the project requirements • Expected results • Benefit from and affected by project outcomes

(Source: Author of the FGP)

4.2.3 Project Scope Definition

The scope for this project was defined through a comprehensive and inclusive requirements collection process. A market analysis was performed on the FND's relevance based on member feedback and extensive market research. The project team developed the project requirements documentation, the requirements management plan, and the requirements traceability matrix for what a successful credit union should be based on the data.

The project description and deliverables were developed based on the requirements collection process and input from subject matter experts in business

development, marketing, and business strategy. This process of expert judgment provided feedback on the most effective way of ensuring the FNDECCU new brand reflected the changing needs of members from which the company can grow and morph into a pioneering financial institution in St. Kitts and Nevis and by extension, within the Eastern Caribbean Currency Union (ECCU).

Through rebranding and restructuring FNDECCU, the credit union will go through several processes to change the corporate image and revamp the operations of the organisation. Restructuring is a powerful strategy that will enable FNDECCU to improve on processes by identifying its strengths, weaknesses, opportunities, and threats. Through rebranding and restructuring, FNDECCU will emerge an organisation which will better serve the needs of its members and provide personalized and innovative financial solutions to the community in which it serves.

4.2.4 Project Scope Baseline

The approved version of a scope statement, work breakdown structure (WBS), and its associated WBS dictionary, can only be changed only through formal change control procedures and is used as a basis for comparison. The scope baseline is composed of three elements: the scope statement, the WBS, and the WBS dictionary. This is the sum total of the project scope, and is part of the project management plan. Any changes to project or product scope will impact one or more of the elements in the scope baseline, and most likely many other project documents as well. The scope baseline should be tightly controlled after it's agreed upon.

4.2.5 Project Scope Statement

This project encompasses the restructuring and rebranding the FNDECCU. The deliverables for this project are the creation of a new brand identity for FNDECCU, improved processes and introduction of policies that better manage the organisation. This project will be accepted once the rebrand has been successfully

initiated with an increase in the surplus and market reposition for growth for the credit union to emerge as the premier financial institutions in St. Kitts and Nevis, providing personalized services in an inclusive environment that caters to a wide variety of people.

This project does not include ongoing operations and maintenance. Only locally based consultants may be used for this project. The project execution will primarily take place in Basseterre, St. Kitts with some elements of the project to be completed at the second branch in Charlestown, Nevis. The project is not to exceed 180 days in duration or XCD $100,000 in spending. The phases and corresponding timelines are broken down as follows: 1 month for project initiation, 1 month dedicated to planning, 3.5 months for implementation and 2 weeks for project closure. The timeline for project completion is September 1, 2020 to February 28th, 2021.

Assumptions for this project are that all the relevant stakeholders will provide support and that sufficient resources are available for the successful completion of this project.

PROJECT SCOPE STATEMENT

Project Title: Restructuring and rebranding the FNDECCU   **Date Prepared:**   **31/8/2020**

Product Scope Description

This project encompasses the restructuring and rebranding the FNDECCU to fulfil an organizational strategy set out by the Board of Directors to grow the organization and improve its market positioning.

Project Deliverables

The deliverables for this project are the creation of a new brand identity for FNDECCU, improved processes and introduction of policies that better manage the organization. Project completion will occur when the organisation has been totally transformed and FNDECCU is transitioned to First Federal Co-operative Credit Union with the following:

- Name change
- Rebuild brand identity through redesigning logo and establishing new brand colours
- Change of organisarional structure
- Physical enhancement of branches to reflect new brand
- Market repositioning
- Change of policies and manuals
- Redefine mission, vision, and values
- Change of all stationery including bank books, cheques, forms
- New website and social media presence

Project Acceptance Criteria

Given the members of the FNDECCU expect organization growth as a result of restructuring, then this project will be accepted once the rebrand has been successfully initiated with an increase in the surplus and market reposition for growth for the credit union to emerge as the premier financial institutions in St. Kitts and Nevis, providing personalized services in an inclusive environment that caters to a wide variety of people.

Project Exclusions

- This project does not include ongoing operations and maintenance.
- Services must not be procured from regional or international consultants or vendors. Only locally based consultants may be used for this project.
- No extensive or deliberate work related to expansion with new locations, recruiting,

> and hiring new staff or the operations of the FNDECCU will be pursued in this project.

Project Constraints

- The project is not to exceed 180 days in duration or XCD $100,000 in spending. Stakeholder satisfaction.
- Only available software at FNDECCU will be used.
- Slow communication flow between executives and project managers could result in unpredictable project decelerations.

Project Assumptions

Assumptions for this project are that all the relevant stakeholders will provide support and that sufficient resources are available for the successful completion of this project.

4.2.6 Milestones and Work Breakdown Structure

The below chart comprises major project milestones. If any delay arises which may negatively impact a delivery date, the project manager must be notified immediately so that proactive measures may be taken including project crashing or reorganising project resources. The project manager will communicate approved changes to these milestones or delivery dates to the project team as chart 7 is showing.

Chart 7 Summary of Milestone Schedule

Milestone	Description	Date
Complete Requirements	All requirements for rebrand and restructuring must be determined to base deliverables and	9/30/20

Gathering	desired outcomes.	
Market Analysis	Research market position and brand recognition within the market	10/15/20
Strategic Plan	Organisational strategy with details of business requirements and business continuity completed.	10/31/20
Redesign	All redesigns completed resulting in new brand identity.	1/31/21
Organisational Restructuring	Staff retrenchment completed with new organisation design implemented.	1/31/21
Website Development	Complete website redesign based on proposed site map.	1/31/21
Testing	All designs samples approved for full production	1/31/21
Launch and roll out of a Rebranded and Restructured FNDECCU	Completed documentation and transitioned to department managers responsible for operations to execute the new mandate, mission, and vision.	2/28/21

(Source: Author of the FGP)

The FNDECCU's WBS for its rebranding (see Chart 8) provides the breakdown of the total scope of work to be carried out to complete the objectives of the project. The project work packages were developed using expert judgment. Meetings were also conducted to facilitate collaboration among project team members and stakeholders with input from department managers, research, focus groups and member surveys.

The WBS dictionary provides detailed information about each element in the WBS, including work packages and control accounts restructure and redesign of FNDECCU. These definitions include all tasks, resources, and deliverables. Every work package in the WBS is defined in the WBS Dictionary and will aid in resource planning, task completion, and ensuring deliverables meet project requirements.

The project schedule was derived from the WBS and Project Charter with input from all stakeholders. The project schedule was reviewed and approved and anchored in a baseline. The schedule will be maintained using a Gantt Chart. Proposed schedule changes must be done through the approved change control process protocol. A change request submission must be made to the Project Manager for any schedule change that exceeds the established limits. Further to this requirement, the Project Manager and team will assess the impact that the change could have on the schedule, resources, cost, scope, and risks. If the assessment concludes that the impacts will exceed the set limits (CPI greater than 1.5 and SPI greater than 1.5), then the change will be forwarded to the Project Sponsor for review and approval.

Project sponsor approved changes will subsequently be implemented by the Project Manager. For this change to be completed seamlessly, the project manager must update the schedule along with any other related documents and communicate the change to all stakeholders per the Change Control Process.

The Project Schedule Baseline, Activity List in chart 8, Work Breakdown Structure and WBS Dictionary are illustrated in figure 3 below.

Chart 8 Rebrand and Restructuring Activity List

No.	Task
1.0	**Research**
1.1	Sponsor Requirements
1.1.1	Project Requirements/Scope
1.2	Market Research
1.2.1	Market Analysis
1.2.2	Findings analysis
1.3	Strategic Plan
1.3.1	Business Requirements
1.3.2	Stakeholders register
1.3.3	Project Priorities

1.3.4	Stakeholder Consultations
2.0	**Design**
2.1	New Exterior and Interior Designs
2.2	Organisational Needs
2.3	Brand Identity
2.3.1	Logo Design
2.3.2	Mission and Vision Statements
2.3.3	Slogans and Taglines
2.3.4	Values
2.4	Website design
2.4.1	Site map
2.4.2	Content Creation
2.4.3	Graphic Design
2.5	Social Media Presence
2.5.1	Target audience
2.5.2	Social Media marketing objectives
2.5.3	Social Media platforms
3.0	**Build**
3.1	Remodel of Building
3.1.1	Physical enhancements and interior decor
3.2	Organisational Restructure
3.2.1	Organisational Chart
3.3	Website
3.3.1	Domain registration
3.3.2	Website hosting
3.3.3	Content upload in the website
3.4	Social Media Marketing
4.0	**Test**
4.1	Quality Testing
4.1.1	User Acceptance testing
4.1.2	Focus Group Consultation
5.0	**Marketing**
5.1	Marketing Strategy
5.2	Paraphernalia
5.3	Email campaign
6.0	**Project Management**
6.1	Planning
6.2	Scheduling
6.3	Execution
6.4	Accounting
6.5	Monitoring and Evaluation
6.6	Meetings

(Source: Author of Study)
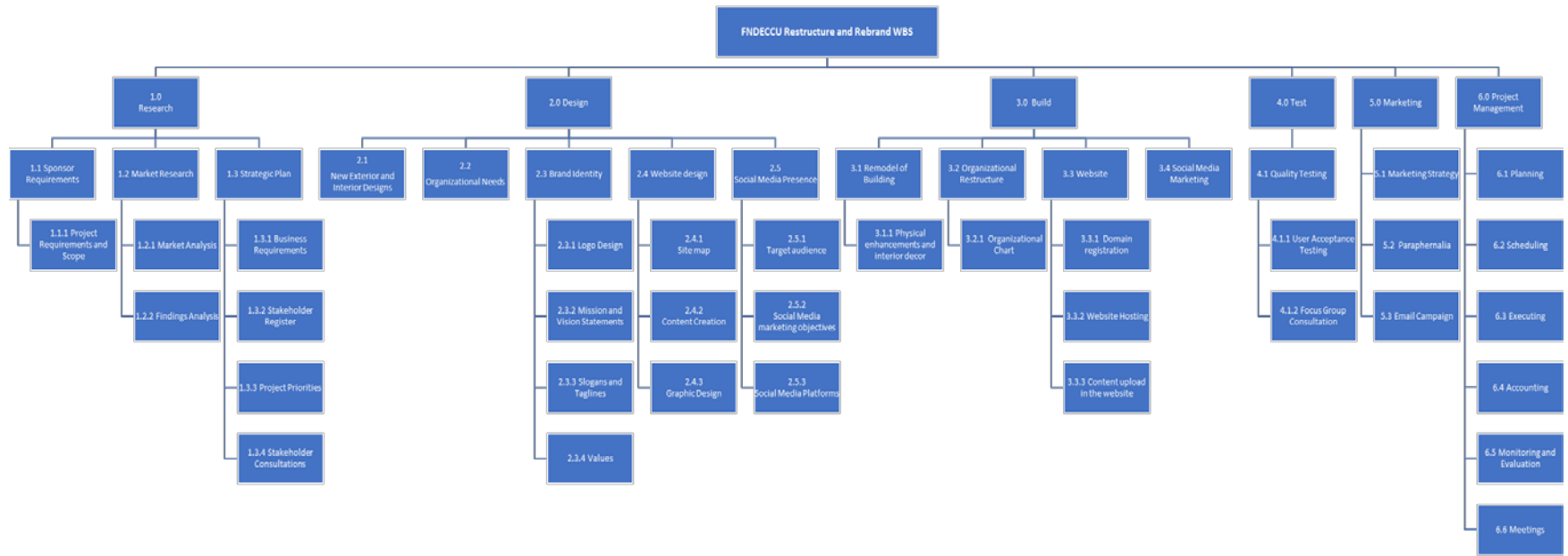
Figure 3 FNDECCU Restructure and Rebrand WBS

Chart 9 Restructuring and rebranding work packages

The work packages outlined below and were developed using a bottom-up approach indicative of the level of time and effort to achieve each aspect of the project and the actions to be executed with regards to her realization of the outstanding project milestones..

WBS CODE	Activity Name	Description of Work	Deliverables	Budget	Resources
1.0	**Research**	An important part of the project integration. Allows for preliminary research to the collection of information necessary for decision making.	-	$2000	
1.1	Sponsor Requirements	Meeting to determine project needs	Initial requirement documentation		Computer Internet Stationery
1.1.1	Project Requirements and Scope	Description and scope of work established	Scope Definition		Computer
1.2	Market Research	Conducting surveys to obtain pertinent information	-		Computer Internet
1.2.1	Market Analysis	Collect findings	Data Findings		Computer

					Internet
1.2.2	Findings Analysis	Analyze findings	Marketing Strategy		Computer Internet
1.3	Strategic Plan	Develop a strategic plan which outlines how the business will use its new brand identity to increase business activity.	Strategic Action Plan		Computer Internet
1.3.1	Business Requirements	Expert Judgment, consultations, and Meetings to determine the requirements for a new and improved organisation.	Business Requirement Specifications Document		Computer Internet
1.3.2	Key Stakeholders	Determine key stakeholders	Stakeholder list		Computer Internet
1.3.3	Project Priorities	Classify Requirements of Stakeholders	Stakeholder Matrix		Computer Internet
1.3.4	Stakeholder Consultations	Discuss solutions, plans, and seek guidance from stakeholders.	Stakeholder Requirements		Meeting Room Computer Internet

2.0	**Design**			$10,000	
2.1	New Exterior and Interior Designs	Procure services of an architect and interior designer to come up with a new look for physical space/building.	Architecture documentation		Computer
2.2	Organisational Needs	Consultations with various department heads to determine the needs of the organisation to improve and grow.			Computer Internet
2.3	Brand Identity	Creation of a new look and value system which includes new value propositions.	Strategic Marketing Plan		Graphic Designer
2.3.1	Logo Design	Create a new symbol that appeals to a younger target audience.	Graphic Design Concepts		Graphic Designer Computer
2.3.2	Mission and Vision Statements	Create vision and mission that aligns with the new value propositions.	Mission and Vision Statements		Computer
2.3.3	Slogans and Taglines	Develop marketing catch-all phrases to build brand	Tagline		Computer

		position.			
2.3.4	Values	Create values that align with the new direction of the organisation.	Value Proposition		Computer
2.4	Website design	Develop, modern, user-friendly website.	User-friendly website		Computer Developer
2.4.1	Site map	Detail site map.	Website Site Map		Computer Development Template
2.4.2	Content Creation	Designing elements for website including imagery, verbiage, and multimedia.	Engaging Content		Computer Graphic Designer
2.4.3	Graphic Design	Design imagery for website	Graphic Design Library		Computer
2.5	Social Media Presence	Detail plan for social media presence including aesthetics, tone, and design.	Social Media Following		Computer Internet
2.5.1	Target audience	Meetings to determine the audience which brings the most value to a restructured organization.	Target Audience Behavior Analysis		Computer

2.5.2	Social Media marketing objectives	Development of main goals of social media engagement.	-		Computer Internet
2.5.3	Social Media Platforms	Identification of optimal social media platforms	-		Computer Internet
3.0	**Build**			**$50,000**	
3.1	Remodel of Building	Painting, new fixtures and fittings based on design specifications.	New building layout		Plans Drawings
3.1.1	Physical enhancements and interior decor	Painting, new fixtures and fittings based on design specifications.	Redesigned building		Plans Drawings Renderings
3.2	Organisational Restructure	Staff retrenchment and redesign of organisation.	Business Continuity Plan		Computer Internet
3.2.1	Organisational Chart	Devise an improved organisational chart reflective of the organisation post-retrenchment.	Organisational Chart		Computer Internet
3.3	Website Development	Develop website in accordance to the site map and design plan	User Friendly Website		Computer Internet
3.3.1	Domain Registration	Secure website domain from	Website domain		Computer

		nameserver			Internet
3.3.2	Website Hosting	Host website using cloud-based server	Website hosted on a secure platform		Computer Internet
3.3.3	Content Upload in Website	Upload curated content onto website	Content Uploaded		Computer Internet
3.4	Social Media Marketing	Launch social media using chosen platforms based on criteria outlines in social media design plan	Social Media Followers		
4.0	**Test**			**$5,000**	
4.1	Quality Testing	Allow focus groups to preview new logo concepts, website, social media content.	Quality assurance report		Computer Internet
4.1.1	User Acceptance testing	Get approvals from 90% of members	User acceptance Data		Internet
4.1.2	Focus Group Consultation	Discuss pros and cons with focus group.	User Acceptance Data		Members
5.0	**Marketing**			**$25,000**	
5.1	Marketing Strategy	Brainstorming creative ideas to re-enter the market as a	Marketing Plan		Computer Internet

		disruptor			
5.2	Paraphernalia	Selection of high-impact and affordable promotional items, stationery, and other branded items.	Paraphernalia and redesigned/rebranded stationery		Graphic Designer Broker
5.3	Email campaign	Design email notification to members to inform them of changes.	Email Campaign		Computer Internet
6.0	**Project Management**			**$8000**	
6.1	Planning	Create Project Management Plan and all subsidiary plans.	Project Management Plan		Computer Internet
6.2	Scheduling	Schedule activities based on estimating duration for each work package to meet milestones and complete the project within a timeframe desired by project sponsor.	Schedule Management Plan		Computer Internet
6.3	Execution	Implementation of project activities	Action Plan		Computer Internet
6.4	Accounting	The Monitoring of the finances	Budget		Computer

		and expenditure of the Project			Internet
6.5	Monitoring and Evaluation	The monitoring and control of the implementation of project activities, reporting and documenting project activities.	M & E Plan		Computer Internet
6.6	Meetings	Meetings for brainstorming, consultation, and expert judgment throughout the project-life cycle.	Communication Strategy		Computer Internet

(Source: Author of Study)

Chart 10 Restructuring and rebranding WBS dictionary

The following chart details the existing work packages of the FGP WBS. This further decomposition provides a basis for the timely estimation, sequencing, production, monitoring and evaluation of project work. Time and budget allocation for each proposal component is directly correlated to the level of detail needed for each project deliverable.

Project Title: Restructuring and Rebranding   Date Prepared: 31/8/2020

Work Package Name: Research	Code of Account: 1.0

Description of Work:	Assumptions and Constraints:
Preliminary research to the collection of information necessary for decision making.	The Project Budget and time allocated is suffecient for research
	The Project team and consultant have the skills required for undertaking research
	Constraints:
Milestones:	Due Dates:
- Complete Requirements Gathering: All requirements for rebrand and restructuring must be determined to base deliverables and desired outcomes.	10/31/20
Develop Strategic Plan: Completed the organisational strategy with details of business requirements and business continuity	

ID	Activity	Resource	Labor			Material			Total Cost
			Hours	Rate	Total	Units	Cost	Total	
1.1	Sponsor Requirements	Computer Internet Stationery	4	$50	$200				$200
1.1.1	Project Requirements and Scope	Computer	4	$50	$200				$200
1.2	Market Research	Computer Internet	4	$75	$300				$300
1.2.1	Market Analysis	Computer Internet	4	$75	$300				$300
1.2.2	Findings Analysis	Computer Internet	1	$75	$75				$75

1.3	Strategic Plan	Computer Internet	2	$75	150				150
1.3.1	Business Requirements	Computer Internet	1	$75	$75				$75
1.3.2	Key Stakeholders	Computer Internet	3	$75	$225				$225
1.3.3	Project Priorities	Computer Internet	1	$75	$75				$75
1.3.4	Stakeholder Consultations	Meeting Room Computer Internet	8	$50	$450				$450

Quality Requirements: All plans and research methodologies meet industry best practice standard.

Acceptance Criteria: Given the need for supporting documentation, when the stakeholders require justification for rebranding then a comprehensive business case is presented to the project sponsor or regulators.

Technical Information: The project technical writer and technical support are required to primarily undertake this task using all available tools that are at their disposal.

Agreement Information: Approved by Project Sponsor

Work Package Name: Design					Code of Account: 2.0				
Description of Work:					Assumptions and Constraints:				
Detail the provisions for the Rebrand and Restructure, in terms of coordination and technical elements, website design, logo and insignia design and mission and vision statements etc. All the particulars of each of the aforementioned requirements will be chronicled.					Only available software at FNDECCU will be used. Constraints: -The time for design is limited and some parts must be completed in parallel with the research phase. - Performance level of software required to complete designs				
Milestones: - Resign - All redesigns completed resulting in new brand identity.					Due Dates: 21-06-20				

ID	Activity	Resource	Labor			Material			Total Cost
			Hours	Rate	Total	Units	Cost	Total	
2.1	New Exterior and Interior Designs	Computer	10	$200	$2000				$2000

2.2	Organisational Needs	Computer Internet	1	$50	$50				$50
2.3	Brand Identity	Graphic Designer	5	$150	$750				$750
2.3.1	Logo Design	Computer Graphic Designer	2	$150	$300				$300
2.3.2	Mission and Vision Statements	Computer	1	$50	$50				$50
2.3.3	Slogans and Taglines	Computer	1	$50	$50				$50
2.3.4	Values	Computer	1	$50	$50				$50
2.4	Website design	Computer Developer	10	$250	$2500				$2500
2.4.1	Site map	Computer Development Template	1	$50	$50				$50
2.4.2	Content Creation	Computer Graphic Designer	5	$100	$500				$500
2.4.3	Graphic Design	Computer	60	$25	$1500				$1500
2.5	Social Media Presence	Computer Internet	6	$50	$300				$300
2.5.1	Target audience	Computer	1	$50	$50				$50
2.5.2	Social Media marketing objectives	Computer Internet	6	$50	$300				$300
2.5.3	Social Media platforms	Computer Internet	10	$155	$1550				$1550

Quality Requirements: All designs must be aligned with values of the organisation. Design specifications must be eye-catching and exuberant.
Acceptance Criteria: Products designed meets the specification outlined in the data gathering during the research phase.
Technical Information: Prior to starting the design process, the project team will need to be aware of the proper expectations for the projected number of revisions and hours it will take. Keeping stakeholders involved from the beginning will make it easier to get feedback throughout the process and reach the approval milestone quickly.
Agreement Information: Approved by the Project Sponsor

Work Package Name: Build Phase	Code of Account: 3.0
Description of Work: The execution of the project will primarily take place during this critical phase. This phase utilizes project resources to achieve a desired outcome established through the Research and Design Phase. During this phase, radical changes will occur within a very short period to achieve a high-impact market re-entry strategy. Changes include, new design of the physical building of FNDECCU, brand colors, name, and other insignia. Ultimately, the organisation will be transitioned to First Federal Co-operative Credit Union Ltd.	Assumptions and Constraints: - Local service providers and vendors will be used for consultancy work. - Inflation will not affect the costing of the project materials over the 6-month period - Duty-free and tax concessions will be granted for any material imported. Constraints: -Building cannot commence until the design stage is completed. - Limited budget less than $100,000

Milestones:	Due Dates:							
- Staff retrenchment completed with new organisation design implemented. - Website Development: Complete website redesign based on proposed site map.	31-01-21							

			Labor			Material			Total Cost
ID	Activity	Resource	Hours	Rate	Total	Units	Cost	Total	
3.1	Remodel of Building	Plans Drawings	5	$500	$2,500				$2,500
3.1.1	Physical enhancements and interior decor	Plans Drawings Renderings Paint PVC Wood Plexi-glass	160 2	$100 $100	$16,000 $200	5 20 5 16	$195 $100 $260 $300	$975 $2000 $1300 $4800	$25,275
3.2	Organisational Restructure	Computer Internet	40	$200	$8000				$8000
3.2.1	Organisational Chart	Computer Internet	2	$200	$400				$400
3.3	Website Development	Computer Internet	80	$100	$8000				$8000
3.3.1	Domain Registration	Computer Internet	1	$100	$100				$100

3.3.2	Website Hosting	Computer Internet				12	$100	$1200	$1200
3.3.3	Content Upload in Website	Computer Internet	40	$100	$400				$400
3.4	Social Media Marketing	Computer Internet	33	$125	$4125				$4125

Quality Requirements:
Website and social media sites fully developed without errors.
Building redesigned with new Brand colours while remaining compliant with regulators

Acceptance Criteria: The website is fully functional with all features that were established in the design phase.

Technical Information: All plans and drawings are to be monitored by the project manager for design specifications.

Agreement Information: Approved by the Project Sponsor

Work Package Name: Testing Phase	Code of Account: 4.0
Description of Work:	Assumptions and Constraints:
Validate the efficacy of the rebrand. A short time-window will be allowed for this phase as changes must occur almost synonymously to the Build Phase, due to the	- Focus group will be comprised of members of FNDECCU who will remain confidential Constraints: - Members of focus groups conflicting schedules

nature of the project. For example it is of paramount that imagery, colors, and design concepts be limited to a small focus group for testing and feedback and they be given a short time window to minimize the impact of information breaches to the public.										
Milestones: - Testing: All designs samples approved for full production				Due Dates: 31-01-21						

			Labor			Material			Total Cost
ID	Activity	Resource	Hours	Rate	Total	Units	Cost	Total	
4.1	Quality Testing	Computer Internet	10	$100	$1000				$1000
4.1.1	User Acceptance testing	Internet	20	$100	$2000				$2000
4.1.2	Focus Group Consultation	Members/ Volunteers	20	$100	$2000				$2000

Quality Requirements: Focus groups meet at minimum once per week to evaluate and approve executed design concepts.
Acceptance Criteria: All design and production meet sponsor requirements.
Technical Information: Focus group for testing must be comprised of only FNDECCU members to minimize the occurrence of pre-mature information being disseminated to the general public.
Agreement Information: Approved by the Project Sponsor

Work Package Name: Marketing	Code of Account: 5.0
Description of Work: A high-impact marketing strategy will be executed during this phase. Employing effective and creative marketing solutions to satisfy two (2) key requirements of the	Assumptions and Constraints: Market will remain stable Constraints:

project, to improve market share and better brand positioning. Thus, methods to support this effort will be explored with the intention of utilizing optimal methods and media.	Relatively conservative marketing budget Only local consultants can be hired.
Milestones: - Market Analysis Completed. - Launch: Completed documentation and transitioned to department managers responsible for operations to execute the new mandate, mission, and vision.	Due Dates: 31-01-21

ID	Activity	Resource	Labor			Material			Total Cost
			Hours	Rate	Total	Units	Cost	Total	
5.1	Marketing Strategy	Computer Internet	10	$100	$1000				$1000
5.2	Paraphernalia	Graphic Designer Broker				5,000	$4.7	$23,500	$23,500
5.3	Email	Computer	5	$100	$500				$500

	campaign	Internet							

Quality Requirements:

Website and social media sites fully developed without errors.

Building redesigned with new Brand colours while remaining compliant with regulators

Acceptance Criteria:

The website is fully functional with all features established in design phase.

Marketing paraphernalia are free of errors.

Technical Information: All rebranded items must be secured prior to discarding the presently FNDECCU branded items.

Agreement Information: Approved by the Project Sponsor

Work Package Name: Project Management	Code of Account: 6.0
Description of Work: Through this process, plans are developed considering the technical, organisational, financial, and managerial requirements for implementing the project.	Assumptions and Constraints: - Local service providers and vendors will be used for consultancy work. - Inflation will not affect the costing of the project materials over the

	6-month period - Duty-free and tax concessions will be granted for any material imported. Constraints: - Limited budget less than $100,000 Only local consultants can be hired which may not have the full expertise to execute Project tasks.		
Milestones: Launch and roll out of a Rebranded and Restructured FNDECCU - Completed documentation and transitioned to department managers responsible for operations to execute the new mandate, mission, and vision.	Due Dates: 28-02-21		

ID	Activity	Resource	Labor			Material			Total Cost
			Hours	Rate	Total	Units	Cost	Total	
6.1	Planning	Computer Internet	40	$50	$2000				$2000

6.2	Scheduling	Computer Internet	10	$50	$500				$500
6.3	Execution	Computer Internet	40	$100	$4000				$4000
6.4	Accounting	Computer Internet	10	$200	$200				$200
6.5	Monitoring and Evaluation	Computer Internet	20	$25	$500				$500
6.6	Meetings	Computer Internet	80	$12.50	$1000				$1000

Quality Requirements: Project team maintains constant communication and progress to each stage with no delays.

Acceptance Criteria: Each project phase executed on time and within the designated budget.

Technical Information:

Agreement Information: Approved by the Project Sponsor

(Source: Author of Study)

4.2.7 Work Packages

According to the PMBOK Guide, a work package is defined as the effort required to produce a deliverable within a project. (PMI, 2017, p. 161).

Work packages related to this project that will be used to monitor and control the scope include:

- Research Phase
- Design Phase
- Build Phase
- Testing Phase
- Marketing
- Project Management

Research Phase

This work package is the earliest stage of the project and will employ a research method to identify and validate the scope of the project to proceed effectively with benchmarking and baselining the project deliverables. Market research is vital data gathering where information is collected and documented from stakeholders, the system requirements, and the business case. It will give the project manager an insight and overview into the requirements necessary to redesign and restructure the FNDECCU, to ensure benefits for all stakeholders are maximized.

Design Phase

All requirements will be detailed and documented, and the project management subsidiary plans designed during this critical process.

Build Phase

The execution of the project will primarily take place during this critical phase. This phase utilizes project resources to achieve a desired outcome established through

the Research and Design Phase. During this phase, radical changes will occur within a very short period to achieve a high-impact market re-entry strategy. Changes include, new design of the physical building of FNDECCU, brand colors, name, and other insignia. Ultimately, the organisation will be transitioned to First Federal Co-operative Credit Union Ltd.

Testing Phase

This phase is a crucial step in the process that would validate the efficacy of the rebrand. A short time-window will be allowed for this phase as changes must occur almost synonymously to the Build Phase, due to the nature of the project. For example it is of paramount that imagery, colors, and design concepts be limited to a small focus group for testing and feedback and they be given a short time window to minimize the impact of information breaches to the public.

Marketing Phase

A high-impact marketing strategy will be executed during this phase. Employing effective and creative marketing solutions to satisfy two (2) key requirements of the project, to improve market share and better brand positioning. Thus, methods to support this effort will be explored with the intention of utilizing optimal methods and media.

Project Management

The core to guide this radical change process is through the effective application of project management principles. Through this process, plans are developed considering the technical, organisational, financial, and managerial requirements for implementing the project.

4.2.8 Validate Scope

Formal Acceptance

The following requirements must be met for the project to be accepted as complete:

1. Creation of a new brand identity
2. Retrenchment with a revised organisational chart
3. New Strategic Plan
4. New mission, vision, and values
5. New stationery and brand paraphernalia
6. An action plan which encompasses the following key actions: Identification of stakeholder's needs, Smart project objectives, A detailed project schedule, Project costs, communication plan, implementation of new processes for long term al success.

Once all these requirements are met, the Project Manager and Project Sponsor will affix their signatures for approval.

Approved by:

_____ Date: _____

<Full Name>

Project Sponsor

_____ Date: _____

<Full Name>

Project Manager

4.2.9 Control Scope

Scope changes will be reconciled with the established scope baseline. The Project Manager and the project team will collaborate to control the scope of the project. If for any reason, a change to the project scope is required, the process for recommending changes to the scope of the project will be activated. Any change requests by project team members, must be submitted to the Project Manager using the project change request document. However, due to the nature of the restructuring and rebranding project, requirements may evolve. To a very limited degree, Agile Methods of project management will be adopted to ensure that the project remains flexible so that the result is not negatively impacted due to rigidity. The following steps will be applicable to guide the scope change process.

1. The Project Manager will review the suggested change to the scope of the project.
2. The Project Manager will review the change request based on the criteria established for the intent of the project to be carried out. The Project Manager may also convene a change control meeting between the project team and Sponsor to review the change request further and perform an impact assessment of the change.
3. Project Manager will then formally submit the change request to the Change Control Steering Committee if the change request receives initial approval by the Project Manager and Sponsor.
4. Project Sponsor will then formally accept the change by signing the project change control document once the Change Control Steering Committee approves the scope change.
5. Upon acceptance of the scope change by the Change Control Steering Committee and Project Sponsor the Project Manager will update all project documents and communicate the scope change to all project team members stakeholders.

The Project Team will perform only the work reflected in the WBS dictionary and generate the defined deliverables for each work package. These documents will be referenced in the development of each WBS deliverable. The project team will leverage the WBS Dictionary by using it as a statement of work for each work package. The Project Manager has the ultimate responsibility to oversee the project team and the progression of the project to ensure that this scope control process is followed.

The Requirements Traceability Matrix (Appendix 7) will also be used to ensure that established project requirements are met through executing deliverables.

4.2.10 Scope Verification

As this project progresses the Project Manager will verify interim project deliverables against the original scope as defined in the scope statement, WBS and WBS Dictionary. Project deliverables will be verified for formal acceptance through set weekly meetings with the Project Team and Project Sponsor. Throughout the life of the project, the scope will be verified with any change request made being authorized via a unanimous vote.

Once the Project Manager verifies that the scope meets the requirements defined in the project plan, The Project Manager then engages in subsequent deliberations with the Project Sponsor who ultimately provides formal acceptance for each deliverable.

During this meeting, the Project Manager will present the deliverable to the Project Sponsor for formal acceptance. Any items that do not fall within the criteria outlined for the scope of the project are returned to the relevant project team members for reworking. Once approved, both the project sponsor and manager will accept the deliverable by signing a Project Deliverable Acceptance Document. (see Appendix

6) This will ensure that project work remains within the scope of the project and any interventions made are necessary.

4.3 Schedule Management Plan

4.3.1 Introduction

The Time Plan is intended to be a roadmap to guide the timely completion of project activities. Complex projects involving restructuring require extensive consideration for possible setbacks and careful planning to mitigate against risks or project delays. Project schedules for the restructuring and rebranding of FNDECCU will be developed and managed using MS Project Professional 2019 based on the deliverables outlined in the WBS.

4.3.2 Time Management Approach

In developing the schedule, Activity Definition and Sequencing will take place in order of work packages and assign relationships between project activities. Activity duration estimating will be used to estimate the number of work periods needed to complete individual activities with estimated resources.   The key benefit of this process is that it provides the amount of time each activity will take to complete, which is a major factor in the Develop Schedule process. Activity Resource will be used by the project team to carefully compile a thorough listing of the resources that will be needed in completing each work package.

The project team must agree to the proposed work package assignments, durations, and schedule. Once this is done, the project sponsor will review and approve the schedule and it will then be base lined.

The following will be designated as milestones for all project schedules:
o   Completion of scope statement and WBS/WBS Dictionary
o   Base lined project schedule

- o Approval of final project budget

- o Project kick-off

- o Approval of roles and responsibilities

- o Requirements definition approval

- o Completion of data mapping/inventory

- o Project implementation

- o Acceptance of final deliverables

4.3.3 Roles and responsibilities

The development of the schedule is critical to ensure that the project timeline estimation is based upon assumptions and constraints. It is important that the project team contributes to the development of the schedule, as this will ensure that they create realistic deadlines which will help them remain on task and complete deliverables within the time frame stipulated. The roles and responsibilities for schedule development are as follows:

Roles and responsibilities

Role	Responsibility
Project Manager	• Facilitate work package definition, sequencing, and estimating duration and resources with the project team • Create the project schedule using Project Professional 2019 and validate the schedule with the project team and project sponsor. • Attain schedule authorization from the project sponsor and baseline the schedule.
Project Team	• Participating in work package

	definition, sequencing, duration, and resource estimating.
	• Review and confirm the proposed schedule and perform assigned activities once the schedule is approved
Sponsor	• Participate in reviews of the proposed schedule and approve the final schedule before it is base lined.
Stakeholders	• Participate in reviews of the proposed schedule and assist in its validation.

(Source: Author of Study)

Appendix 5 outlines the FGP Project Schedule based on the WBS.

4.3.4 Define Activities

In this section, the actions necessary for the adequate planning for this project during the preapproved six (6) month period are outlined. Derived from the existing work packages of the FGP WBS, this further decomposition provided a basis for the timely estimation, sequencing, production, monitoring and evaluation of project work.

4.3.5 Sequence Activities

Sequence activities is the process of identifying and documenting relationships among the project activities. In the project management, the key benefit of this type of process is that it defines the logical sequence of work to obtain the greatest efficiency given all project constraints. ("Sequence activities," 2016)

Due to the nature of the work to be done, very few, if any, activities occurred simultaneously. The preliminary schedule was developed, reviewed by the tutor, and confirmed once consensus on the proposed action plan and supporting methodology was reached between the tutor and student.

The illustration 4 and chart 11below depict the schedule with each activity sequencing and duration in weeks.

FNDECCU REBRAND AND RESTRUCTURE

Period Highlight: 1 | Plan Duration | % Complete | % Complete (beyond plan)

WBS CODE	ACTIVITY DESCRIPTION	PLAN START	PLAN DURATION	PERCENT COMPLETE
1	Research			
1.1	Collect Sponsor Requirements	1	1	0%
1.1.1	Meet with Sponsor	1	1	0%
1.1.2	Establish Project Requirements/Scope	1	1	0%
1.2	Market Research	1	2	0%
1.2.1	Conduct Market Survey	2	2	0%
1.2.2	Perform Market Analysis	2	4	0%
1.2.3	Present Findings	2	0.5	0%
1.3	Develop Strategic Plan	2	0.5	0%
1.3.1	Determine Business Requirements	2	1	0%
1.3.2	Identify Key Stakeholders	2	0.5	0%
1.3.3	Categorize and Prioritize	2	0.5	0%
1.3.4	Stakeholder Consultations	2	6	0%
2	Design			
2.1	New Exterior and Interior Designs	2	0.5	0%
2.2	Establish Organizational	3	1	0%
2.2.1	Establish Constraints	3	0.5	0%
2.3	Establish Brand Identity	3	1	0%
2.3.1	Logo Design	3	2	0%
2.3.2	Develop Mission and Vision Statements	3	2	0%
2.3.3	Develop Slogans and Taglines	3	2	0%
2.3.4	Develop Values	3	2	0%
2.4	Website design	4	0.5	0%
2.4.1	Develop Site map	4	0.5	0%
2.4.2	Content Creation	4	0.5	0%
2.4.3	Graphic Design	5	2	0%
2.5	Social Media Presence	5	1	0%
2.5.1	Identify target audience	4	0.5	0%
2.5.2	Develop social media marketing objectives	5	1	0%
2.5.3	Determine Platforms to be used	5	0.5	0%
3	Build			
3.1	Building Remodel	5	16	0%
3.1.1	Physical enhancements and	5	16	0%
3.2	Organizational Restructure	12	2	0%
3.2.1	Develop Organizational Chart	12	1	0%
3.3	Website Development	13	3	0%
3.3.1	Register Domain	13	0.5	0%
3.3.2	Host website	13	0.5	0%
3.3.3	Upload Content	14	2	0%
3.4	Deploy Social Media Marketing	15	8	0%
4	Test			
4.1	Quality Testing	17	2	0%
4.1.1	User Acceptance testing	18	1	0%
4.1.2	Focus Group Consultation	20	2	0%
5	Marketing			
5.1	Develop Marketing Strategy	21	5	0%
5.2	Procure Paraphernalia	18	6	0%
5.3	Create Email campaign	23	3	0%
6	Project Management			
6.1	Planning	1	4	0%
6.2	Scheduling	1	1	0%
6.3	Execution	4	21	0%
6.4	Accounting	1	25	0%
6.5	Monitoring and Evaluation	4	21	0%
6.6	Meetings	1	25	0%
7	END	0	0	0%

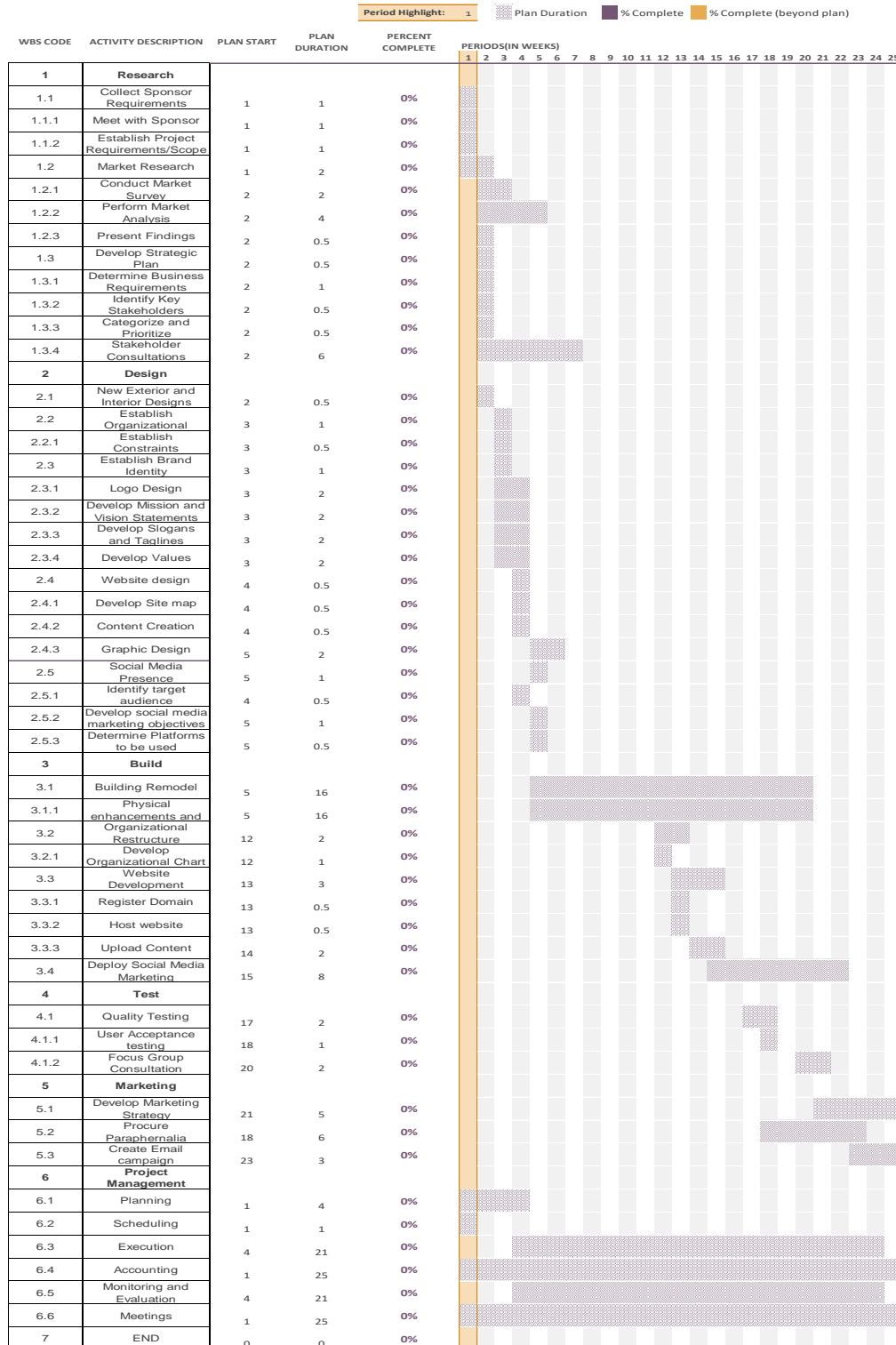PERIODS(IN WEEKS): 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25

Figure 4 Sequencing restructuring and rebranding activities (Source: Author of the study)

Chart 11 List of non-workdays

Holiday	Date
National Heroes Day	September 16, 2020
Independence Day	September 19, 2020
Christmas	December 25, 2020
Boxing Day	December 26, 2020
New Year's Day	January 1, 2021
Last Lap	January 2, 2020

(Source: Author of the Study)

4.4   Cost Management Plan

4.4.1   Plan cost management

The Project Manager will be responsible for managing and reporting on the project's cost throughout the duration of the project.   The Project Manager will present and review the project's cost performance during the monthly project status meeting. Using earned value calculations, the Project Manager is responsible for accounting for cost deviations and presenting the Project Sponsor with options for getting the project back on budget.   All budget authority and decisions, to include budget changes, reside with the Board of Directors of First Federal Credit Union.

Control accounts will be created due to the need to fund project tasks, of which all costs and performance tasks will be managed and tracked efficiently and adequately. Monitoring and Evaluating financial performance of the project will be measured through Earned Value Calculation Method of accounting for costs.

Cost and Schedule Performance Index (CPI and SPI respectively) will be reported monthly by the Project Manager to the CEO and Board of Directors. Variances of 10% or +/- 0.1 in the cost and schedule performance indexes will change the status of the cost to yellow or cautionary. To ensure full transparency, all such costs will be reported and if it is determined that there is no or minimal impact on the cost or schedule baseline then no further action is required. Cost variances of greater than or equal to 20%, or +/- 0.2 in the cost and schedule performance indexes will change the status of the cost to red or critical. These will be reported and will require corrective action from the Project Manager to bring the cost and/or schedule performance indexes within the threshold of the allowable variance. Any corrective actions will require a project change request and must be approved by the Change Control Steering Committee before it can be implemented.

Earned value calculations are to be computed by the Project Manager, documented and reported at the monthly project status meeting. If there are indications that these values will approach or reach the critical stage before a subsequent meeting, the Project Manager will communicate this to the Project Sponsor immediately.

4.4.2 Estimate costs

Estimating the costs will be done using tools such as expert judgment and parametric estimating. Analogous estimating will also be performed as it relates to research for suitable compensation for external consultants and outsourced resources. Costs will be generally low for human resources as these resources will be internal and will be paid from normal operational expenses instead of allocating costs to the project. Costs associated with the project is an increase in travel allowance by FNDECCU staff during the project period.

Documents such as the WBS, project scope statement, project schedule, human resource plan, environmental factors (market conditions, brochures gathered) and the cost plan will be necessary in this regard.

The following charts shows the estimates for human resource (chart 12), resources estimates (chart 13) and a project cost estimates (chart 14).

Chart 12 Human resource estimates

Human Resource Estimates		
Position	Number of Positions	Salary (XCD)
Project Manager	1	3,000
Project Support	4	2,000
Technical Support	1	2,000
Technical Writer	1	1,000
Total		**8,000**

(Source: Author of study)

Chart 13 Resource estimates

Resource estimates	Cost (XCD) $
External Consultants	20,000
Brochures, Stationery, Promotional Items	15,000
Advertising Budget (Google Ads and Facebook Ads)	7,000
Building Materials, Paint, tiles, fixtures	50,000
Total	**92000**

(Source: Author of Study)

Chart 14 Project Budget

The budget is detailed below. Costs for this project are presented in various categories.

Component	Cost (XCD) $
Research	1,000.00
Designing	5,000.00
Human Resource	8,000.00

Testing	5,000.00
Build	52,000.00
Marketing	21,000.00
Sub-Total	
Contingency Reserve (5% of total)	**5,000.00**
Management Reserve (3%)	**3,000.00**
Total	**100,000.00**

(Source: Author of Study)

4.4.3 Manage cost management

Performance of the project will be measured using Earned Value Management.
The following four Earned Value metrics will be used to measure projects cost
performance:

- Schedule Variance (SV) - "a measure of schedule performance
  expressed as the difference between the earned value and the
  planned value" (PMI, 2017, p. 262). It is calculated using the following
  equation: $SV = EV - PV$

- Cost Variance (CV) - "is the amount of budget deficit or surplus at a
  given point in time, expressed as the difference earned and the
  actual cost" (PMI, 2017, p. 262). It is calculated using the equation:
  $CV = EV - AC$

- Schedule Performance Index (SPI) - "is a measure of schedule
  efficiency expressed as the ratio of earned value to planned value"
  (PMI, 2017, p. 262). It can be derived using the formula $SPI = EV/PV$

- Cost Performance Index (CPI) - "is a measure of the cost efficiency of
  budgeted resources, expressed as a ratio of earned value to cost"
  (PMI, 2017, p. 262). The CPI formula is $CPI = EV/AC$.

If the Schedule Performance Index or Cost Performance Index has a variance of
between 0.1 and 0.2 the Project Manager must report the reason for the outlier. If
the SPI or CPI has a variance of greater than 0.2 the Project Manager must report
the reason for the extraordinary circumstance and provide management a detailed

corrective plan to bring the projects performance back to acceptable levels as chart 15 is showing .

Chart 15 Schedule performance index

Performance Measure	Yellow	Red
Schedule Performance Index (SPI)	Between 0.9 and 0.6 or Between 1.1 and 1.2	Less Than 0.6 or Greater than 1.2
Cost Performance Index (CPI)	Between 0.9 and 0.6 or Between 1.1 and 1.2	Less Than 0.6 or Greater than 1.2

4.4.4 Control cost management

Reporting Format

Reporting for cost management will be included in the monthly project status report. The Monthly Project Status Report will include a section labeled, "Cost Management". This section will contain the details of the Earned Value Metrics. All cost variances that exceed the limits that are established in this Cost Management Plan will be reported. Corrective actions that should be taken will also be outlined. Further, Change Requests which arise because of project cost overruns will be identified and tracked in this report.

Cost Variance Response Process

This section of the Cost Management Plan defines the control thresholds for the project and what actions will be taken if the project triggers a control threshold. As a part of the response process the Project Manager typically presents options for corrective action to the Project Sponsor who will then approve an appropriate

action to bring the project back on budget. The Project Manager may propose to increase the budget for the project, reduce scope or quality, or some other corrective action.

The Control Thresholds for this project is a CPI or SPI of less than 0.6 or greater than 1.2. If the project reaches one of these Control Thresholds a Cost Variance Corrective Action Plan is required. The Project Manager will present the Project Sponsor with options for corrective actions within five business days from when the cost variance is first reported. Within three business days from when the Project Sponsor selects a corrective action option, the Project Manager will present the Project Sponsor with a formal Cost Variance Corrective Action Plan. The Cost Variance Corrective Action Plan will detail the actions necessary to bring the project back within budget and how the effectiveness of the actions in the plan will be measured. Upon acceptance of the Cost Variance Corrective Action Plan it will become a part of the project plan and will be documented as a result.

Cost Change Control Process

Typically, the change control process follows the project change control protocol. If there are special requirements for the cost change control process, they should be detailed in this section of the Cost Management Plan.

The cost change control process will follow the established project change request process. Approvals for project budget/cost changes must be approved by the project sponsor.

4.5 Quality Management Plan

4.5.1 Introduction

It is imperative the project not only be delivered on time and on budget, but also meeting high quality standards.

4.5.2 Quality Baseline

The rebrand and restructuring of FNDECCU is a high-value and high-risk project. Each phase must be executed seamlessly for project success. The project must meet the quality standards established in the quality baseline. The quality baseline is the baseline which provides the acceptable quality levels of the project. The complete rebranding and restructuring must meet or exceed the quality baseline values established by the project sponsor and agreed by the project team to achieve success. In the following chart 16 the quality baseline is displayed.

Chart 16 Quality baseline matrix

Item	Acceptable Level	Comments
Rebrand	30% increase in market share.	
Restructuring	30% growth in assets.	
Creation of policies and operational manuals	Less than 1% failure rate in beta testing new users to execute processes.	
Process Documentation	Loan processing turnaround time of 3 days average.	Turnaround time measured by officer, per branch and overall.

The project team plays a critical role in the quality management process. It is imperative that the team ensures that work is completed at an adequate level of quality from individual work packages to the final project deliverable.

4.5.3 Roles and responsibilities for quality control

In The following Chart 17 outlines the roles and responsibility of project custodians for quality control:

Chart 17 Quality roles and responsibilities

Roles	Responsibilities
Project Sponsor	- Approves quality standards for the project. - Reviews project tasks and deliverables to ensure compliance with established and approved quality standards. - Signs off on the final acceptance of the project deliverable.
Project Manager	- Performs quality management throughout the duration of the project - Implements the Quality Management Plan and makes sure all tasks, processes, and documentation are compliant with the plan. - Collaborates with the project's consultant to establish acceptable quality standards using expert judgment - Communicates and tracks quality standards to the project team and relevant stakeholders.
Project Team	Assists the Project Manager in the establishment of acceptable quality standards.

	• Ensures that all quality standards are met and communicate any concerns regarding quality to the Project Manager.
Stakeholders	• Ensure that all quality standards are met and communicate any concerns regarding quality to the Project Manager.

(Source: Author of Study)

4.5.4 Tools and methodology

A Quality Check Sheet, seen below and Cause and Effect diagram (see Appendix 8) will be utilized as primary tools for Quality control to ensure that all project deliverables comply with approved quality standards. To meet deliverable requirements and expectations, a formal process in which quality standards are measured and accepted will be implemented. The Project Manager will ensure all quality standards and quality control activities are met throughout the project. The project team will assist the Project Manager in verifying that all quality standards are met for each deliverable. If any changes are proposed and approved by the Project Sponsor and Change Control Steering Committee, the Project Manager is responsible for communicating the changes to the project team and updating all project plans and documentation.

The following quality checklists in figures 5, 6 and 7, will be utilized as primary tools for Quality control to ensure that all project deliverables comply with approved quality standards.

Quality Checklist					
Project: FNDECCU Rebrand and Restructure				**Date:**	
	Verification				
Quality Item	**Yes**	**No**	**N/A**	**Date**	**Comments**
Does the project have an approved quality management plan?					
Has the quality management plan been reviewed by all stakeholders?					
Do all stakeholders have access to the quality management plan?					
Is the quality management plan consistent with the rest of the overall project plan?					
Have product quality metrics been established, reviewed, and agreed upon?					

Figure 5 Organisational chart for project team (Source: Author of Study)

Quality Checklist					
Project: FNDECCU Rebrand and Restructure				**Date:**	
	Verification				
Quality Item	**Yes**	**No**	**N/A**	**Date**	**Comments**
Is the project leader aware of his/her responsibilities relating to quality acceptance?					
Is the external Stakeholder aware of his/her responsibilities relating to quality acceptance?					

(Source: Project Management Doc, n.d.)

Figure 6 Organisational chart for project team (Source: Author of Study)

Quality Checklist					
Project: FNDECCU Rebrand and Restructure				Date:	
Verification					
Quality Item	**Yes**	**No**	**N/A**	**Date**	**Comments**
Have process quality metrics been established, reviewed, and agreed upon?					
Do all metrics support a quality standard which is acceptable?					
Do all metrics have agreed upon collection mechanisms?					
Do all metrics have an agreed upon collection frequency?					
Have Quality Metrics Review Meetings been scheduled throughout the project's duration?					
Are all metrics clear, measurable, controllable, and reportable?					
Is the project team familiar with the project's quality review process?					
Does the project have an appropriate number of resources assigned for quality assurance and control?					
Has the project team established a repository for all quality documentation?					
Do all team members have access to the quality documentation repository?					
Have all appropriate team members been notified of their required participation in quality reviews?					
Have quality responsibilities been assigned and documented and the applicable personnel notified?					
Have process quality standards been established, documented, and communicated?					
Have quality thresholds and limits been established, documented, and communicated?					
Does the change control process? accommodate project changes based on quality improvements?					

Figure 7 Organisational chart for project team (Source: Author of Study)

4.5.5 Quality assurance

For the Quality Assurance aspect of the project, the project manager will ensure that all processes used in the completion of the project meet acceptable quality standards. These process standards are in place to maximize project efficiency and minimize waste. For each process used throughout the project, the Project Manager will track and measure quality against the approved standards with the assistance of the project team and ensure all quality standards are met. If any changes are proposed and approved by the Project Sponsor and Change Control Steering Committee, the Project Manager is responsible for communicating the changes to the project team and updating all project plans and documentation.

4.6 Human Resource Management Plan

4.6.1 Introduction

The Rebrand and Restructuring of FNDECCU will primarily consist of a simple matrix structure with only very limited support being required from department heads. The core project team is an ad hoc team designed to execute the project objectives. This team will consist of the Marketing Manager, a Project Manager who is the Operations Manager and a business development consultant. Some work will be outsourced where technical assistance is required by experts in the field such as graphic designers, contractors, painters, and printers.

In this phase the roles and responsibilities of the project team will be defined.

Chart 18, seen below, defines these roles and the number of positions available.

Chart 18 Human resource management roles and responsibilities

Role	Number of Resources	Responsibility
Project Manager	1 position	The Project Manager is

		responsible for all aspects of the rebrand and restructure which includes planning, creating, and/or managing all work activities, variances, tracking, reporting, communication, performance evaluations, staffing, and internal coordination with functional managers.
Project Support	1 position	Responsible for oversight of every aspect of the project. Responsible for working with the Project Manager to create work packages, manage risk, manage schedule, identify requirements, and create reports. Project support will be managed by the Project Manager who will provide performance feedback to the functional manager.
Technical Support	1 position	The Business Development consultant will act as technical support to negotiate with all necessary FNDECCU

		functional managers to identify and assign resources for the Project. All resources must be approved by the appropriate functional manager before the resource may begin any project work. The project team will not be co-located even though support will be required for the Nevis Office for this project and all resources will remain in their current workspace.
Technical Writer	1 Position	Responsible for compiling all project documentation and reporting into organisational formats. Responsible for scribing duties during all project meetings and maintaining all project communication distribution lists. The Technical Writer will be managed by the Project Manager who will also provide feedback to the functional manager for performance evaluations.

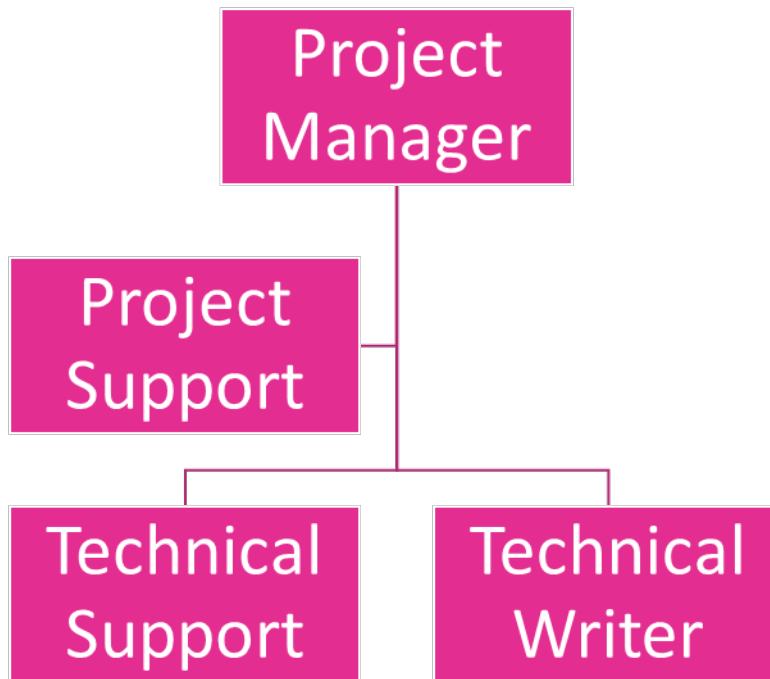Figure 8 shows the hierarchy and reporting structure of the key human resources.

Figure 8 Organisational chart for project team (Source: Author of Study)

4.6.2 Resource calendar

The resource calendar, in the figure 6, will be developed and executed to identify key resources needed for the project and the times/durations they will be needed. The Project Sponsor and Functional Managers will agree to this information prior to beginning the project.

For the Rebrand and Restructuring project, some resources will be needed for the entire length of the project while others will be required for only part of the project. Levels of effort will vary as the project progresses. The Project is scheduled to last 6 months with standard 40-hour workweeks. If a project team member is required

for more than a full 40-hour workweek at any point during the project, considerations for overtime will be at the discretion of the project manager.
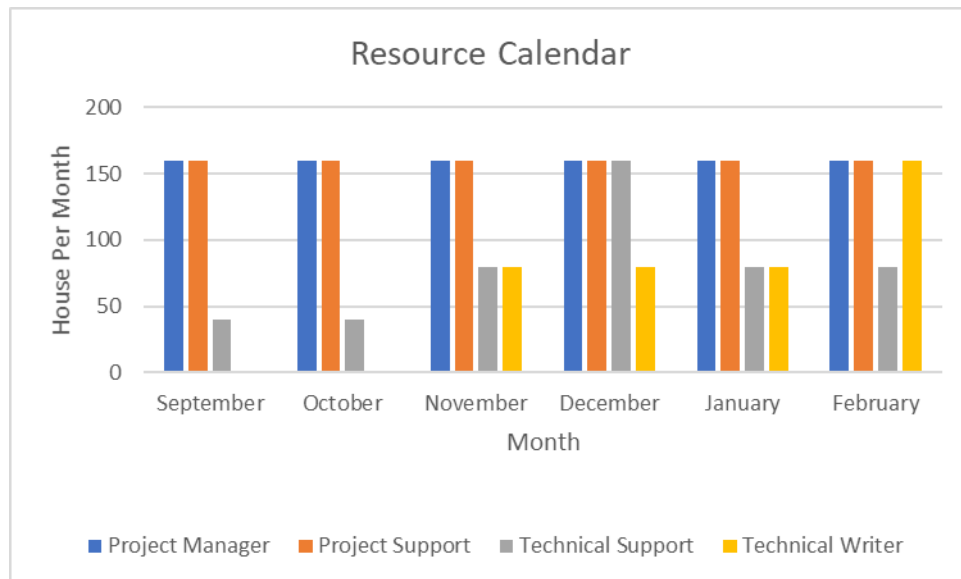

Figure 9 Organisational structure (Source: FND Credit Union Annual Report 2018)

4.7   Communication management plan

4.7.1   Communication management plan approach

The Rebrand and Restructure of FNDECCU Communications Management Plan contemplates several key concepts. The Project Manager will outline communication requirements based on roles. For this, the Project Manager will define the What, How, When and Who of communication, including the mode, means, and responsible party.

4.7.2   Communication management plan framework

This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication requirements change. This plan identifies and defines the roles of project team members as they pertain to communications. It also includes a communications matrix which maps the

communication requirements of this project, and communication conduct for meetings and other forms of communication. A project team directory is also included to provide contact information for all stakeholders directly involved in the project.

The Project Manager will take the lead role in ensuring effective communications on this project.

Figure 10 (the communications matrix) as seen below documents the communication requirements of the project. The communications matrix will be used as the guide for what information to communicate, who will do the communicating, when to communicate it, and to whom to communicate.

Communication Type	Description	Frequency	Format	Participants/ Distribution	Deliverable	Owner
Weekly Status Report	Email summary of project status	Weekly	Email	Project Sponsor, Team and Stakeholders	Status Report	Project Manager
Weekly Project Team Meeting	Meeting to review action register and status	Weekly	In Person	Project Team	Updated Action Register	Project Manager
Project Monthly Review (PMR)	Present metrics and status to team and sponsor	Monthly	In Person	Project Sponsor, Team, and Stakeholders	Status and Metrics Presentation	Project Manager
Project Gate Reviews	Present closeout of project phases and kickoff next phase	As Needed	In Person	Project Sponsor, Team and Stakeholders	Phase completion report and phase kickoff	Project Manager

Figure 10 Communication matrix (Source: Author of Study)

Project team directory for all members of the project team will be used as a reference for their contact details and is seen in figure 11 below.

Name	Title	E mail	Office Phone	Cell Phone
FNDECCU	Project Sponsor	info@fndeccu.com	xxx-xxx-xxxx	xxx-xxx-xxxx
Shanwa Broadbelt	Project Manager	sbroadbelt@fndeccu.com	xxx-xxx-xxxx	xxx-xxx-xxxx
Sonja Fyfield-Hazel	Technical Support	sfyfieldhazel@fndeccu.com	xxx-xxx-xxxx	xxx-xxx-xxxx
Sheryl Evans	Technical Writer	sevants@fndeccu.com	xxx-xxx-xxxx	xxx-xxx-xxxx

Figure 11 Project team directory (Source: Author of the Study)

4.7.3 Communications conduct

Meetings:

The Project Manager will distribute a meeting agenda at least 2 days prior to any scheduled meeting and all participants are expected to review the agenda prior to the meeting. During all project meetings the timekeeper will ensure that the group adheres to the times stated in the agenda and the recorder will take all notes for distribution to the team upon completion of the meeting. Meeting minutes will be distributed no later than 24 hours after each meeting is completed. Comments for minutes and action items will be communicated within 24 hours of the dissemination of the minutes and Minutes will be signed for approval and distributed no more than 3 days after the meeting.

Email:

Emails should be professional and free of errors. Email should be distributed to all relevant project participants in accordance with the communication matrix above based on its content. If the purpose of the email is to address an issue, then it should discuss what the issue is, provide a brief background on the issue, and provide a recommendation to correct the issue. The Project Manager is to be copied to all emails pertaining to the project.

Informal Communications:

While informal communication is a part of every project and is necessary for successful project completion, any issues, or updates that arise from discussion between team members must be formalized by being communicated to the Project Manager so the appropriate action may be taken.

4.8   Risk management approach

4.8.1   Risk management approach

The approach for managing risks for the Restructuring and Rebranding Project includes a methodical process by which the project team identifies, scores, and ranks the various risks. Every effort will be made to proactively identify risks ahead of time to implement a mitigation strategy from the project's onset.

4.8.2   Risk management approach

The most likely and highest impact risks were added to the will be identified and prioritized to ensure that the assigned risk managers take the necessary steps to implement the mitigation response at the appropriate time during the schedule. Risk managers will provide status updates on their assigned risks in the weekly project team meetings, but only when the meetings include their risk's planned time

frame.   It is important to assign roles and responsibilities to each risk manager to be able to quickly respond to risks. The following figure 7 RACI Matrix details how.

RACI Matrix

RISK MANAGEMENT

FNDECCU Rebrand and Restructuring

Responsible, **A**ccountable, **C**onsulted, **I**nformed

Deliverable or Task		Status	ROLES	Sponsor	Project Manager	Project Support	Technical Lead	Technical Writer	Consultant
					Project Team				Other Resources
1	Risk Planning			I	R	A	D	S	C
2	Risk Identification			I	R	A	D	S	C
3	Risk Analysis			I	R	A	D	S	C
4	Quantitative Risk Analysis			I	R	A	D	S	C
5	Risk Response Planning and Action Plan			I	R	A	D	S	C
6	Development			I	A	R	D	S	C
7	Risk Monitoring and			I	R	A	D	S	C
8	Control			I	R	A	D	S	C
9	Lessons Learned Documentation			I	A	S	D	R	C

D	Driver	Assists those who are responsible for a task.
R	Responsible	Assigned to complete the task or deliverable.
A	Accountable	Has final decision-making authority and accountability for completion. Only 1 per task. Provides support during implementation.
S	Support	
C	Consulted	An adviser, stakeholder, or subject matter expert who is consulted
I	Informed	Must be informed after a decision or action.

Figure 12 Risk management RACI Matrix (Source: Author of study)

4.8.3   Risk identification

The risk identification process is paramount in ensuring project success. Ensuring that adequate and timely risk identification is performed is the responsibility of the project manager. Risks should be identified as a critical aspect of the project integration phase so that plans may be put in place to mitigate or manage them. (National Research Council et al., 2005, p. 22)

Further, it is important, however, that all project management personnel receive specific training in risk management methodology. This training should cover not only risk analysis techniques but also the managerial skills needed to interpret risk assessments. The risk identification function is a meticulous and deliberate undertaking and should be explicitly covered in a number of project documents including Statement of work (SOW), Work breakdown structure (WBS), Budget and Schedule.

The following methods will be used to assist in the identification of risks associated with the project:
1.   Expert Judgment
2.   Risk Assessment Meetings
3.   Brainstorming
4.   Interviewing
5.   PESTLE Analysis
6.   SWOT (Strengths, Weaknesses, Opportunities and Threats)

The following PESTLE analysis in figure 11 elucidates risks that exist in the external environment to the organisation and may be seen as both organisational and project related risks.
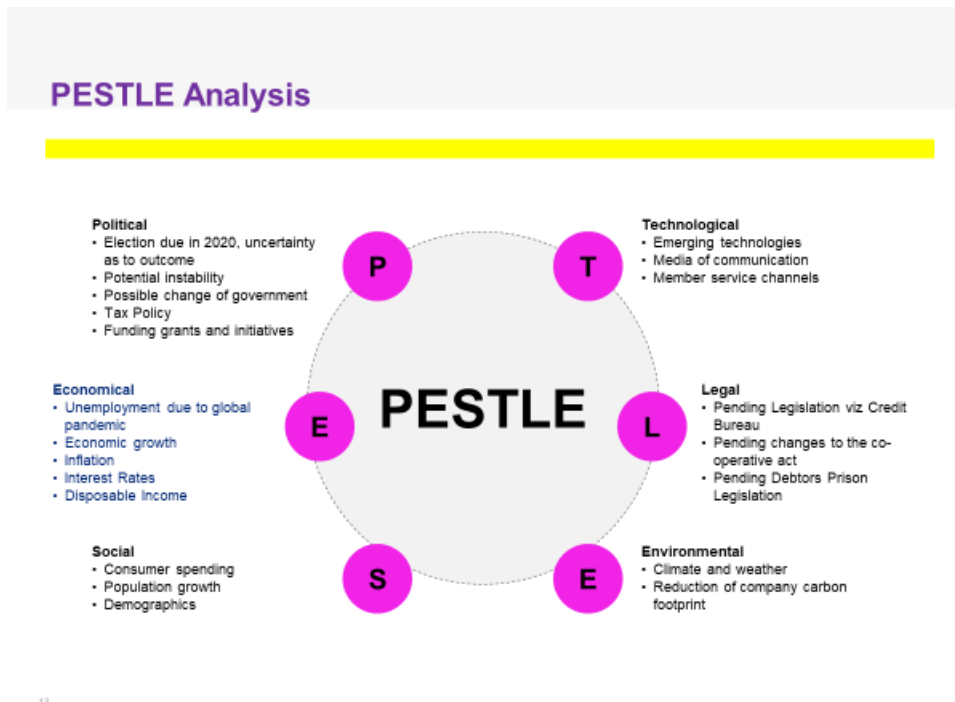

Figure 13 FNDECCU PESTLE analysis (Source: FNDECCU strategic plan 2020 – 2022)

The SWOT analysis in figure 12 highlights some of the risk factors for weaknesses and threats to the organisation and by extension, the rebranding and restructuring project.

Figure 14 FNDECCU SWOT analysis (Source: FNDECCU strategic plan 2020 – 2022)

4.8.4 Control risk

Upon the completion of the project, during the closing process, the project manager will analyze each risk as well as the risk management process. Based on this analysis, the project manager will identify any improvements that can be made to the risk management process for future projects. These improvements will be captured as part of the lessons learned knowledge base.

4.8.5 Risk register

The Risk Register for this project is provided below:

Chart 19 Risk register

FNDECCU Rebranding and Restructuring Project Risk Register

Project name: FND ECCU Rebrand and Restructuring

Project manager: Shanwa Broadbelt

ID	Date raised	Risk description	Severity	Likelihood of the risk occurring	Impact if the risk occurs	Risk Trigger	Risk Owner	Mitigating action	Risk Response	Progress on actions	Status (Open/ Closed)
1	[enter date]	Project purpose may not be well defined and could lead to	High	Medium	High	Stakeholder raises a concern about the direction	Project Manager	Complete a business case if not already	Escalate to the Board of Directors with an		

		misunderstandings in the project scope that will negatively impact the stakeholders' project satisfaction.	Red	Yellow	Red	of the project.		provided and ensure purpose is well defined on Project Charter.	assessment of the risk of costs.		
2	[enter date]	Project design and deliverable definition are incomplete and could cause additional deliverables to be undertaken and the	High	Low	High	Tasks undertaken outside of the scope of the project.	Project Sponsor	Define the scope in detail via design workshops with input from subject matter experts.	Document assumptions made and associated risks. Request high risk items that are ill-defined are removed		

#	Date	Risk				Consequence	Owner	Mitigation	Contingency		
		project to be overrun on cost and time.	 	 	 				from scope.		
3	[enter date]	Consultant or contractor delays could lead to a delay in the project schedule which will negatively impact the stakeholder satisfaction.	High	Medium	High	Project delay.	Project Manager	Include late penalties in contracts. Build in and protect lead time in the schedule. Communicate schedule early. Check in with	Escalate to Project Sponsor and Contracts Manager. Implement late clauses.		

#	Date	Risk				Impact	Owner	Mitigation	Contingency		
								suppliers regularly. Constantly follow up with contractors and keep communication lines open.			
4	[enter date]	Estimating and/or scheduling errors could cause unrealistic expectations of budget and schedule effectiveness	High	Medium	High	Project operating over budget and significant delays in time.	Project Manager	Break this risk into two: 'cost estimating' and 'scheduling errors'. Use two methods of cost	Escalate to project sponsor and project board. Raise change request for change to budget or		

| and will negatively impact the project sponsor. | | | estimation, and carefully track costs and forecast cost at completion, planning as necessary. Build in 10% contingency on cost and scheduling. Track | schedule. Pull down contingency. | | |

| | | | | | | | schedules daily and include schedule review as an agenda item in every project team meeting. Flag forecast errors and/or delays to the Project Board early. | | | |

| 5 | [enter date] | Scope creep could cause additional deliverables to be consistently added and changes undertaken that will cause the project to be overun on cost and time and will decrease the productivity of the project team. | High | Medium | High | Tasks undertaken outside of the scope of the project. | Project Manager | Document the project scope in a Project Initiation Document or Project Charter and get it authorised by the Project Board. Refer to it throughout the project and assess all changes against it | Document every example of scope creep no matter how small in a change order and get authorisation from the project board before starting work. This includes zero cost changes. | | |

			 	 	 			also ensuring alignment of any changes with the Business Case.			
6	[enter date]	Theft of materials, intellectual property or equipment would lead to major security breaches and would negatively affect the reputation or integrity of	High	Low	High	Report of theft for missing materials or equipment. Failure to successfully seek redress for	Project Manager	Follow security procedures, ensure Non-Disclosure Agreements, & compliance certificates are in place.	Notify appropriate authorities e.g. police, project board and initiate internal investigations.		

		the project team and will diminish the confidence of the stakeholders in the security protocols.	RED	GREEN	RED	copyright infringement if intellectual property is stolen.		Verify all physical security measures in place. Secure insurance.			
7	[enter date]	Acts of God for example, extreme weather, leads to loss of resources, material or premises could cause the project to incur additional expenses to	High	Medium	High	Inability to claim from insurance due to inadequate coverage.	Project Manager	Ensure insurance is in place. Familiarise project team with emergency procedures. Where cost effective put back	Notify appropriate authorities. Follow health and safety procedures. Notify stakeholders and Project Board.		

		replace lost or damaged resources which will negatively impact the sponsor's willingness to invest more money into the project.	<td style="background:red"></td>	<td style="background:orange"></td>	<td style="background:red"></td>			up systems in place e.g. generators, parallel systems.			
8	[enter date]	Project schedule is not clearly defined or understood could cause significant project delays that will dissatisfactio	<td style="background:orange">Medium</td>	<td style="background:green">Low</td>	<td style="background:orange">Medium</td>	Project delay.	Project Manager	Hold scheduling workshops with the project team so they understand the plan	Share the plan and go through upcoming tasks at each weekly project progress meeting.		

		n with stakeholders.						and likelihood of missed tasks is reduced.			
9	[enter date]	Stakeholders omitted or misclassified which will cause some stakeholders to object to the the project and will be unwilling to participate in critical areas where their participation is required.	Medium	Low	Medium	Stakeholder refusal to support a project goal.	Project Manager	The Project Manager will execute extensive research to ensure that project stakeholders are identified and prioritized properly.	Escalate to the Project Sponsor and bring in back up resource.		

								He will brief the project team on the importance of identifying and prioritizing stakeholders.			
1 0	[enter date]	Unplanned work that must be accommodated which could lead to the project team having to take on	Medium	Low	High	Request for additional funding and project extensions.	Team Manager	Check all plans and quantity surveys. Document all assumptions made	Escalate to the Project Manager with plan of action, including impact on time, cost and		

		more tasks and work overtime to complete the project and will cause them to become overwhelmed and unproductive.	 	 	 			in planning and communicate to the project manager before project kick off.	quality.		
1 1	[enter date]	Lack of communication, causing lack of clarity and confusion may cause redundancy in roles and project team	Medium	Low	Medium	Project teams intersect in completing tasks.	Project Manager	Write a communication plan which includes frequency, goal, and audience of each communic	Correct misunderstandings immediately. Clarify areas that are not clear swiftly using		

to overlap functions which results in wastage of time and resources.					ation. Identify stakeholders early and make sure they are considered I the communication plan. Use most appropriate channel of communication for the audience.	assistance from Project Sponsor if needed.		

| 12 | [enter date] | Pressure for project crashing to reduce task durations and or run tasks in parallel which would increase risk of errors. | Medium | Low | High | Project delays | Project Manager | Share the schedule with key stakeholders to reduce the risk of this happening. Patiently explain that schedule was built using the expertise of subject matter experts. Explain | Escalate to Project Board with assessment of risk and impact of the change. Hold emergency risk management call with decision makers & source of pressure and lay out risk and impact. | |

			<td style="background:orange"></td>	<td style="background:green"></td>	<td style="background:red"></td>			the risks of the changes.			
1 3	[enter date]	Unresolved project conflicts not escalated in a timely manner which can cause a breakdown in communicatio n with the project team and cause some members of	Medium	Low	Medium	Ambiguou s communic ation.	Project Manager	Hold regular project team meetings and look out for conflicts. Review the project plan and stakehold er engagem ent plan	When aware immediatel y escalate to Project Board and gain assistance from Project Sponsor to resolve the conflict.		

		the team to be frustrated.						for potential areas of conflict.		
1 4	[enter date]	Added workload or time requirements because of new direction, policy, or statute which could lead to the project team having to assume more responsiblilty , undertake more tasks and work	Medium	Low	Medium	Project operating over budget and significant delays in time.	Project Sponsor	No ability to reduce likelihood.	Consider insurance and use Board of Directors to get advance notice if possible.	

		overtime to complete the project and will cause them to become overwhelmed and unproductive.								
1 5	[enter date]	Breach of Confidentiality will result in mistrust and lack of confidence amoung the project stakeholders and project sponsor may take drastic	Medium	Low	Low	Informatio n leak.	Project Manager	Ensure Code of Secrecy is signed by all personnel who will be exposed to privilege informatio	Notify and escalate to legal department if a breach occurs. Follow instructions from legal.		

		measures to prevent further damage such as pre-maturely end the project.						n before starting the project.			

(Source: Author of the FGP)

4.8.6 Risk response planning

The risk response planning involves determining ways to reduce or eliminate any threats to the project, and the opportunities to increase their impact. It is the responsibility of the project manager to identify and eliminate the threats before they occur. Similarly, the project manager will analyze risks to ensure that opportunities that arise from risk may be capitalized. The project manager is also responsible to decrease the probability and impact of threats and increase the probability and impact of opportunities. When responding to risks, execution of strategies must be time-bound, and the effort selected must be appropriate to the severity of the risk. ("Greycampus," n.d.)

The project manager will have a robust contingency plan for unavoidable risks that cannot be mitigated and a response plan if contingencies do not work. Such risks are identified in the Risk Register above.

Risk Response Strategies

Risk response strategies for threats include:
- Avoid: Elimination of the cause so that the impact of the risk can be avoided entirely. This would entail altering the original project plan by changing the time, cost, budget, and scope.
- Mitigate: There are certain risks that cannot be eliminated. However, their impact can be reduced through proactive action.
- Transfer: Transfer the risk to some other party, for example insurance policy and force majeure clauses in vendor contracts.

Risk response strategies for Opportunities include:

- Exploit: Add work or change the project to make sure the opportunity occurs
- Enhance: Increase the probability and positive impact of risk events
- Share: Allow other parties to engage in the ownership of the opportunity, for example increasing market share by raising the profile of all credit unions.

- Accept: No actions are taken, in case of a risk event. Active acceptance may involve contingency plans to be implemented if risk occurs and allocation of time and cost reserves to the project. The project sponsor must be informed of any decision to accept risks.

4.9   Procurement management plan

The Project Manager will provide oversight and management for all procurement activities under this project. The Project Manager is authorized to approve all procurement actions up to $10,000. Transactions exceeding $10,000 must be approved by the Project Sponsor.

To ensure that delays are minimized, Project Procurement will be simplified and be delivered in a "3-2-1" process, which was specially designed to assist with procurement efficiency.

"3" Quotations must be acquired from at least 3 vendors,

"2" Deliberations and comparisons must be completed within 2 business days

"1" Purchase or contract must be facilitated within 1 business day.

This project relies heavily on product and service procurement for several instances including but not limited to, acquiring new stationery for project, graphic and website design, proof-reading and interior design.

The Project Manager will work with the project team to identify all items or services to be procured for the successful completion of the project ahead of time so that it takes into consideration shipment delays.   Using Meetings and Cost Benefit Analysis, the Project Team will review the procurement actions, determine whether it is advantageous to make or buy the items or resource required services internally, and begin the vendor selection, purchasing and the contracting process. The Project Manager will be the liaison between selected vendors. The Project Manager will also measure performance as it relates to the vendor providing necessary goods and/or services and communicate this to the purchasing and contracts groups.

4.10 Stakeholder management plan

4.10.1 Statement management plan approach

This Stakeholder Management Plan will ensure the proper identification, categorization and participation of programme stakeholders in the processes, decisions and activities throughout the project life cycle. In planning for optimal stakeholder engagement, a collection of processes with associated tools will be used to ensure a more communal and engaging approach for the inclusion and support of individuals, clusters of persons and entities, able to affect or be affected directly or indirectly. Stakeholders will be categorized and engaged based on their relative levels of authority, internal or external placement, interests and general project perceptions.

Four stakeholder management processes will be conducted at intervals throughout the project life cycle and are outlines as follows:

1. Identify stakeholders using Meetings and Expert Judgment
2. Plan Stakeholder Management using Expert Judgment and Stakeholder Meetings.
3. Manage Stakeholder Engagement using Communication Methods, Interpersonal Skills and Management Skills; and
4. Control Stakeholder Engagement through Meetings and Expert Judgment Techniques.

The Project Manager will perform an analysis using the Stakeholder Engagement Assessment Matrix Template to identify the current level of engagement for each stakeholder. "C" will be used (in the respective slot) to identify the current level of engagement while "D" (in the respective slot) to identify the desired level of engagement. These findings will influence how stakeholders will be grouped and categorized. The assessment matrix, chart 10, is listed below:

Chart 20 Stakeholder assessment matrix template

	Unaware	Resistant	Neutral	Supportive	Leading

(Source: Author of study)

4.10.2 Identify stakeholders

Stakeholders for this project are the individuals or groups who, in any way, are perceived to be affected, can affect, or are affected by the rebranding and restructuring of FNDECCU. The relevant information is documented and analysed to allow for the adequate and appropriate engagement of each person, organisation, or group throughout the project life cycle.

Critical to the success of the project, is the ability of the Project Team to identify and classify project stakeholders. Key stakeholders will be identified to garner support for project, balance conflicting interests and to facilitate resource optimization necessary for project success. Stakeholders will be identified through focus group meetings with the management of FNDECCU in the project initiation stage. The RACI matrix (figure 10) will be used for the purpose of analysing the roles and responsibility of each internal and external stakeholder.

RACI Matrix

Roles and Responsibilities

FNDECCU Rebrand and Restructuring

Responsible, **A**ccountable, **C**onsulted, **I**nformed

	Deliverable or Task	Status	Sponsor	Project Manager	Project Support	Technical Lead	Technical Writer	Consultant
					Project Team			Other Resources
1	**Research**							
1.1	Collect Sponsor Requirements			R	C	I	D	C
1.1.1	Meet with Sponsor			R	S	I	I	I
1.1.2	Establish Project Requirements/Scope			R	R	I	I	I

ID	Task						
1.2	Market Research		A	R	D	D	C
1.2.1	Conduct Market Survey		A	R	D	D	C
1.2.2	Perform Market Analysis		A	R	D	D	C
1.2.3	Present Findings		R	R	D	D	C
1.3	Develop Strategic Plan	C	R	R	D	D	C
1.3.1	Determine Business Requirements	C	R	S	D	D	S
1.3.2	Identify Key Stakeholders	C	R	S	S	D	C
1.3.3	Categorize and Prioritize Requirements	C	R	S	S	D	C
1.3.4	Stakeholder Consultations	C	R	R	S	D	C
2	**Design**						
2.1	New Exterior and Interior Designs	I	R	S	R	I	C
2.2	Establish Organisational Needs	I	R	S	R	I	C
2.2.1	Establish Constraints	I	R	S	R	I	C
2.3	Establish Brand Identity	I	R	S	R	I	C
2.3.1	Logo Design	C	R	S	R	I	C
2.3.2	Develop Mission and Vision Statements	I	R	S	R	D	C
2.3.3	Develop Slogans and Taglines	I	R	S	R	D	C
2.3.4	Develop Values	I	R	S	R	D	C
2.4	Website design	I	A	S	R	I	R
2.4.1	Develop Site map	I	A	S	R	I	R
2.4.2	Content Creation	I	R	S	R	I	C
2.4.3	Graphic Design	I	R	S	R	I	R
2.5	Social Media Presence Development	I	R	S	R	I	C

No.	Task						
2.5.1	Identify target audience		I	R	S	R	I	C
2.5.2	Develop social media marketing objectives		I	R	S	R	D	R
2.5.3	Determine Platforms to be used		I	R	S	R	I	R
3	**Build**							
3.1	Building Remodel		I	A	R	R	I	C
3.1.1	Physical enhancements and interior decor		I	A	R	R	I	C
3.2	Organisational Restructure		I	R	D	S	I	C
3.2.1	Develop Organisational Chart		I	R	C	C	S	C
3.3	Website Development		I	A	R	R	I	I
3.3.1	Register Domain		I	A	R	R	I	I
3.3.2	Host website		I	A	R	R	I	I
3.3.3	Upload Content		I	A	R	R	I	I
3.4	Deploy Social Media Marketing		I	A	A	D	S	R
4	**Test**							
4.1	Quality Testing		I	A	S	R	I	R
4.1.1	User Acceptance testing		I	A	S	R	I	R
4.1.2	Focus Group Consultation		C	R	S	R	I	R
5	**Marketing**							
5.1	Develop Marketing Strategy		C	R	S	R	D	R
5.2	Procure Paraphernalia		I	A	S	R	D	R
5.3	Create Email campaign		I	A	S	R	D	R
6	**Project Management**							
6.1	Planning		I	R	D	A	S	C
6.2	Scheduling		I	R	D	A	S	C
6.3	Execution		I	R	D	A	S	C

6.4	Accounting		I	R	D	A	S	C
6.5	Monitoring and Evaluation		I	R	D	A	S	C
6.6	Meetings		I	R	D	A	S	C

D	Driver	Assists those who are responsible for a task.
R	**Responsible**	Assigned to complete the task or deliverable.
A	**Accountable**	Has final decision-making authority and accountability for completion. Only 1 per task.
S	**Support**	Provides support during implementation.
C	**Consulted**	An adviser, stakeholder, or subject matter expert who is consulted before a decision or action.
I	**Informed**	Must be informed after a decision or action.

Figure 15 RACI matrix (Source: Author of study)

The criteria contemplated for who will be included as a stakeholder criterion reads as follows and will provide the basis for the identification of the stakeholders:

1. Person or organisation directly or indirectly affected by the project.

2. Person or organisation in a position to influence the project.

3. Person or organisation able to impact project resource availability.

4. Person or organisation with specialized capabilities, skills, or services necessary for project success.

5. Person or organisation that can potentially benefit from project execution; and

6. Person or organisation with the power to approve or to resist and obstruct the progress of the project.

It is very important for the stakeholders to be captured in the project integration phase so that it eliminates the risk of incurring unnecessary conflict of inadvertent omissions of a stakeholder.

Further, most stakeholders identified would have to be consulted or informed before the project begins to ensure full transparency.

On completion of the stakeholder register, a power/interest grid will be populated to show their Interests, Power, Requirement and Expectations. Stakeholders are hence assigned to one (1) of four (4) groupings / quadrants (based on figure 11), namely:

High Interest / High Power – also known as Key Stakeholders, are most affected by project works. They have considerable influence and must be prioritized most satisfied, well engaged and managed closely, and are assigned to the first quadrant.

High Power / Low Interest – also known as Important Stakeholders, who should be intermittently informed of major changes. These stakeholders are assigned to the second quadrant.

Low Power / High Interest – also known as Affected Players, should be kept informed on all project matters and are assigned to the fourth quadrant.

Low Power / Low Interest – also known as Potential Players, need to be monitored and are assigned to the third quadrant.

Power-Interest Grid

Figure 16 Power-interest grid (Source: PMI.org)

4.10.3 Manage stakeholder engagement

In this section, the Project Manager will work closely with his team to increase programme support and minimize associated resistance from stakeholders through carefully managing needs, expectations, and influence. Matters arising during this time will be handled expeditiously and conflict resolution techniques will also be applied. Additionally, stakeholder engagement and management will be systematically fostered throughout the project life cycle.

The Key Stakeholders will comprise custodians, regulators, and the members of the credit union. They will be fully engaged about and involved in the project. Much effort will be put into ensuring their satisfaction with project outcomes and this relationship will be regularly monitored to ensure a sustained strong stakeholder relationship.

The subsequent communication plan and strategies will govern communication with all programme stakeholders to sustain and ultimately heighten the chances of project success.

These stakeholders will be engaged appropriately, and issue logs will be used to collect, record, and resolve concerns expressed by stakeholders. The proposed plan for engagement is captured in the chart 20 below.

Chart 21 Stakeholder engagement plan

Project Sponsor	Manage closely	Project manager	Personal check-in meetings, email notifications from software	Daily
Management Team	Keep informed	Project manager	Memos + agenda summaries	Weekly
Financial Service Regulatory Commission	Keep satisfied	Project manager	Top of the line emails about the overall budget/timeline progress	Monthly
Credit Union League	Keep informed	Project manager	Memos + agenda summaries	Monthly
Members	Monitor	Project Team	Newsletter	Monthly

(Source: Author of FGP)

4.10.4 Control stakeholder management

In this section, stakeholder relationships will be monitored for the timely and appropriate strategic application of preventative and or corrective stakeholder engagement practices. During this phase, the Project Team and Project Manager are critical players, both individually and or in group settings, particularly in the exchange and analysis of various project related information. The dynamics of the project may mean that stakeholders (at any point in the project life cycle) may move between quadrants for one of several reasons and as such will need to be engaged appropriately so that the adequate response is applied.

The project manager is responsible for monitoring and when necessary, activate the control mechanism for stakeholder engagement at any point of the project life cycle.

The Project Manager is expected to have a pulse of the needs and any concerns of all stakeholders. Should a stakeholder be identified as moving within quadrants, the Project Manager will record the stakeholder(s) name, role within the project, time of change specifications and the rationale for the movement. This information would be deliberate by the Project Team using Meetings then, the project manager will use information to adequately reassign stakeholders within quadrants and for the adequate and timely strategic engagement of each of them. This will be further facilitated using the Formal Change Request Form in Appendix 9.

The official changes once adopted by the Project Sponsor will be reflected within a revised stakeholder register and will highlight the new ranking and proposed communication approach

for respective stakeholders. This phase is imperative to ensure that stakeholders remain fully engaged, committed and co-operative through each life cycle of the project.

SPONSOR ACCEPTANCE

Approved by the Project Sponsor:

Date:

<Project Sponsor>
<Project Sponsor Title>

5   CONCLUSIONS

Having fully developed this Project Management Plan for the Restructuring and Rebrand of FNDECCU, we may conclude that over efficiency in project execution and by extension operations at FNDECCU could be achieved using the tools, methodologies of project management.

The study was targeted at ensuring the FNDECCU morphs into a new brand with a new culture and ways of doing things to better serve its members and the wider community. Through a series of established project management tools and techniques; process reevaluation; and continuous consultation, after 10 years of operations, FNDECCU will be engaged in its first formal project, managed using the principles of project management. Through this research several findings and observations were made.

Developing the project management plan along with its subsidiary plans will ensure that FNDECCU completes the Rebrand and Restructure on time and within the scope and in keeping with the budget to ensure satisfaction of project stakeholders. One of the main findings was the need to manage non-for-profit projects with for profit principles to ensure maximum efficiency and efficacy.   The project outlines how through the creation of a comprehensive Project Management Plan for its first internally managed project, FNDECCU can continuously use the framework to innovate while remaining true to its core principles of being a not-for-profit organisation.

The scope management plan detailed the requirements of the project to mitigate against scope creep. Complex projects such as a rebrand and restructure requires a strict adherence to the project scope baseline and will allow for effective monitoring and evaluation techniques to be employed. Additionally, the scope management plan worked within the constraints that were established in terms of time and budget. The scope management plan provided a clear path to monitoring scope changes and provided the project team with the necessary guidelines for trade-offs and to make necessary adjustments so that the project can remain on track. Additionally, the WBS was created to establish the work packages that are necessary to complete the project to ultimately satisfy stakeholders. The details that were provided in the WBS dictionary will ensure that the project team will perform only the work outlined to eliminate the risks of increasing project cost and the need to extend the deadline or assign

more   resources   to   the   work   packages.

The schedule management plan was created to ensure that the project team completes the tasks within the allotted time frame. This project allows for several activities to be done parallel to each other in order to efficiently use resources and stay within the time allotted to complete the project. Therefore, special attention was given to correctly sequencing the tasks whereby predecessors, successors were clearly identified. Moreover, a schedule diagram was created to guide the successful completion of the project which was derived from the time management   plan,

The Cost Management Plan was developed as one of the fundamental tools to guide the successful completion of the project. The plan will establish a baseline for costs as well as monitor and control all project related costs. The FNDECCU is a relatively small organization with a staff of less than 20, therefore staying within budget was paramount. In this regard estimating costs and analyses for earned value management will be critical for ensuring that the budget is efficiently utilized. Noteworthy, costs will be generally low for human resources as these resources will be internal and will be paid from normal operational expenses instead of allocating costs to the project.

Development of the Quality Management Plan provided the standard for completing a high-quality project which will ultimately meet or supersede the expectations of the project sponsors and other stakeholders. The plan mandates that each phase be executed seamlessly for project success. The project must meet the quality standards established in the quality baseline. Therefore, the complete rebranding and restructuring must meet or exceed the quality baseline values established by the project sponsor and agreed by the project team to achieve project success.

The Human Resource Plan was critical in determining and identifying human resources with the necessary skills required to undertake the various project tasks to ensure project success. Therefore, an important element of this plan was the assignment of qualified and experienced personnel to the most suitable tasks based on their skillset using a RACI. Further, the human resource plan documents project roles and responsibilities, project organization charts and the staffing management plan including the timetable for optimizing staffing in terms required labour days for various tasks.

The rebrand and restructuring of FNDECCU is a high-value and high-risk project. The Risk Management Plan identifies both potential negative and positive risks. Once properly implemented, the risk management plan will mitigate against the negative ones and take advantage of the positive. To mitigate against project risks, a Risk Matrix along with a Roles and Responsibilities was created. Through employing the required risk response strategies, the likelihood of project failure will be low.

The Communication Management Plan was designed to create clear communication lines between the project team, the project sponsor, and stakeholders. Managing stakeholder communication will be essential for ensuring their satisfaction. It was also important to manage the information flow and determine the type, frequency and volume of information that goes to the respective stakeholders. Further guidelines were created for both informal and formal means of communication to ensure that the project team will have guidance on the acceptable communication methods and protocols.

A Procurement Management Plan was developed to identify the goods and services for the project ensuring that appropriate contracts and contractual arrangements were defined. The evaluation and subsequent selection of vendors was done via RFIs and RFQs. A 3-2-1 system was specially developed to minimize the lag that complicated procurement processes can sometimes cause.

This Stakeholder Management Plan will ensure the proper identification, categorisation and participation of programme stakeholders in the processes, decisions, and activities throughout the project life cycle. In planning for optimal stakeholder engagement, a collection of processes with associated tools will be used to ensure a more communal and engaging approach for the inclusion and support of individuals, clusters of persons and entities, able to affect or be affected directly or indirectly. Stakeholders will be categorized and engaged based on their relative levels of authority, internal or external placement, interests, and general project perceptions.

6 RECOMMENDATIONS

Based on the findings of the research, the student makes the following recommendations to the CEO and Board of Directors of the FNDECCU. The following recommendations are related to the Project Management Plan presented above and will prove to be helpful in guiding future projects of a similar nature.

- It is paramount for FNDECCU to adopt project management techniques in pursuit of any project in the near or distant future. Subsequently, the project management plan along with the other subsidiary plans must always be formulated and documented. The plan for the restructuring may prove beneficial to be used as a guide for reference. Therefore, the present Project Management Plan and its execution must be tracked, analyzed, and well documented to be used for future projects with adaptations for organisational efficiency.

- The scope management plan should be as detailed as possible to ensure that the project remains within the scope. Notwithstanding, it may be concluded that it is important to carefully balance agile project management methods with standard PMBOK guidelines to manage the scope of a project that requires radical change. Due to the nature of the restructuring and rebranding project, requirements may evolve. To a very limited degree, Agile Methods of project management ought to be adopted to ensure that the project remains flexible so that the result is not negatively impacted due to rigidity.

- The schedule management plan is critical for the project to be completed within the stipulated time. Therefore, special attention must be placed by the project team as it relates to maintaining strict time management measure. Deviations from the schedule could send the project out of sync and negatively impact other areas such as budget, scope and quality.

- Special attention must be paid to the Cost Management Plan in order to create a solid baseline to guide the present and future projects. This is important because, as FNDECCU grows it is expected that more projects will be required through the growth phase which includes; an additional location, technological improvements such as the implementation of an ATM card machine, a new mobile banking app and implementing business intelligence data systems, which will require a faultless cost management plan

to sure that the credit union's funds are used wisely. To ensure strict budget adherence, automated templates to track spending should be created and constant analysis of the value gained from the project should be made.

- As it relates to the Quality Management Plan, a high-quality project must be delivered. Developing and executing project management plans where organisational change is a key deliverable, trade-offs between scope, cost and schedule factors must be considered.

- The Human Resource Management plan must be prudently implemented. The successful implementation of FNDECCU's Project Management Plan must include extensive human resource management intervention as the success of the project will be driven by a bottom up approach. It is recommended that FNDECCU facilitates capacity building, education, and ongoing communication to train all staff in project management practices.

- In the present global economic climate, FNDECCU must pay special attention to all risks identified. The potential for external risks is heightened during the period of project implementation due to the high frequency of natural disasters and the present global pandemic. Therefore, it is imperative to establish the appropriate risk responses ahead of the project start date to guarantee project success.

- Proper communication within the project is necessary to maintain project success. The project manager must therefore possess managerial skills to create an environment whereby the team works in unison and when issues or conflicts arise they can be solved without placing the project in jeopardy.

- The procurement management plan must be carefully developed. It is proposed that through this project, FNDECCU can adopt best practices for improving its procurement processes as well as use the opportunity to focus on high efficiency for general operational processes.
- The stakeholder management plan must include management measures to properly consider and cater to each stakeholder based on their individual rank and categorisations.

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7 APPENDICES

Appendix 1: FGP Charter

PROJECT CHARTER	
Formalizes the project start and confers the project manager with the authority to assign company resources to the project activities. Benefits: it provides a clear start and well defined project boundaries.	
Date	**Project Name:**
March 15, 2020	Project Management Plan to execute an organisational strategy to restructure and rebrand the Foundation for National Development Enterprise Co-operative Credit Union in Saint Kitts and Nevis.
Knowledge Areas / Processes	**Applicacion Area (Sector / Activity)**
Knowledge areas: Scope, Cost, Time, Stakeholders, Human Resources, Procurement, Communications, Risk, Quality, **Process groups: Initiate, Plan, Monitor and Control**	Finance
Start date	**Finish date**
March 15, 2020	August 31, 2020

Project Objectives (general and specific)
General Objective: **To develop a Project Management Plan to execute an organisational strategy to restructure and rebrand the Foundation for National Development Enterprise Co-operative Credit Union in Saint Kitts and Nevis.**   Specific objectives: Objective 1: To develop a project management plan that details guidelines to restructure and rebrand FNDECCU through the creation of subsidiary plans including; a project integration plan, scope management plan, time management plan, cost management plan, quality management plan, human resource management plan, communications management plan, risk management plan, procurement management plan and a stakeholder managerment plan.   Objective 2: To develop a strategic implementation plan which emcompasses the following short, medium and long term actions;   • Short-term - Identifying and satisfying the needs of the stakeholders through utilizing information technology, applying best management practices for executing the project management plan at the point of initiation throughout the project life cycle.   • Medium: Utilizing a kick-off meeting which prioritizes and sets defined goals and deliverables, along with weekly follow up meetings that marks project milestone success in order to manage risks, minimize delays and stay withing the project budget.   • Long-term: Building on processes introduced in the project management plan and implementing the improved systems and processes and capacity building during the closing phase of the project to meet the pre-defined metrics for project success.

Project purpose or justification (merit and expected results)
Several organisations and entities in St. Kitts and Nevis fail to continuously improve through innovation and creativity. The main purpose of the project is to explore how, through the application of various tools of project management, that an organisation can be transformed to better service the financial needs of the banked and unbanked in a highly competitive environment. Developing this comprehensive project management plan that can not only guide the restructuring of the FND ECCU, but can be used as a blue print that can easily be applied to like entities that require a radical change to remain useful.

Description of Product or Service to be generated by the Project – Project final deliverables
Project Management Plan   Name change of FNDECCU   Change of logo, brand colours, mission and vision statements   New website and social media presence   Improvement of operations through enhanced processes

Assumptions

- The project can be completed within the 3 months allotted and can be done by one Project Manager.
- Student will be in good health to complete assignment within scope and time.
- The requirements for the FGP will remain as currently established.
- Sufficient budget and resources will allocated for the restructuring of FNDECCU

Constraints

Time: Uncertainty regarding whether the scope is beyond the time allocated due to individual planning.
Budget: Budget over-run due to inadequate project allocation
Risk of inadequare data sources to reference for meaningful analysis.

Preliminary risks

If student submissions are submitted beyond the required deadline, grades will not be received.
If student fails to get access to information required to complete deliverables, outputs will be inadequate.

Budget

$100,000

Milestones and dates

Milestone	Start date	End date
Submission of Project Charter	March 1 2020	March 1 2020
Completion of Graduation Seminar	March 1, 2020	April 1 2020
Tutoring	April 15, 2020	August 8, 2020
Reading by Reviewers	August 10, 2020	September 1, 2020
Corrections submitted	September 1, 2020	September 7, 2020
Final Presentation	September 7, 2020	September 7, 2020

Relevant historical information

The Foundation for National Development (FND) opened its doors in 1985. As a not-for-profit entity with funding provided by CIDA & USAID, the institution's purpose was to provide small businesses with financing, technical assistance and operational training, thereby bridging the funding gap between the commercial banks and micro businesses/entrepreneurs. To provide additional support to micro businesses, the FND guaranteed loans made by traditional credit sources (Banks and Credit Unions). FND's regular clientele included farmers, fishermen, hairstylists, truckers, motor mechanics, store owners etc.

In July 2020, the institution FNDECCU will change its name to First Federal Co-operative Credit Union Limited to reflect the vision of the founders, to be the first Credit Union to establish a presence in both St. Kitts and Nevis. First Federal Co-operative Credit Union Limited developed a suite of product and services that responds to the changing needs of its expanding membership. The new mission and vision Fostering the financial growth of a community of members by encouraging thrift, designing custom tailored products and creating wealth.

Stakeholders

Direct stakeholders: FNDECCU Members, Board of Directors, Committees

Indirect stakeholders:
Financial Services Regulatory Commission
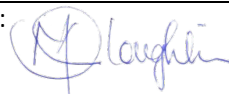Government of St. Kitts and Nevis
People of St. Kitts and Nevis

| Project Manager: Markysa O'Loughlin	Signature:
Authorized by:	Signature:

Appendix 2: FGP WBS

| Appendix 2: FGP WBS	
Chart 13: FNDECCU FGP WBS (Source: Author of the study)	
No	Task
	Final Graduation Project
1	Final Graduation Seminar
1.1	Week 1 Deliverables
1.1.1	Charter
1.1.2	WBS
1.2	Week 2 Deliverables
1.2.1	Introductory Chapter
1.2.2	FGP Schedule
1.3	Week 3 Deliverables
1.3.1	Theoretical Framework
1.4	Week 4 Deliverables
1.4.1	Methodological Framework
1.5	Week 5 Deliverables
1.5.1	Executive Summary
1.5.2	Bibliography
1.5.3	Indexes
1.5.4	Signed Charter
2	**Tutoring Process**
2.1	Tutor
2.1.1	Tutor Assignment
2.1.2	Communication Establishment
2.2	Previous Chapter Adjustments (If needed)
2.3	Chapter IV. Development (Results)

2.3.1	Scope Management Plan Submission
2.3.2	Tutor Review
2.3.3	Cost Management Plan & Corrections Submission
2.3.4	Tutor Review
2.3.5	Time Management Plan & Corrections Submission
2.3.6	Tutor Review
2.3.7	Stakeholder Management Plan & Corrections Submission
2.3.8	Tutor Review
2.3.9	Communication Management Plan & Corrections Submission
2.3.10	Tutor Review
2.4	Chapter V. Conclusions
2.5	Chapter VI. Recommendations
2.6	Tutor Review
2.7	Final Project Submission
2.8	Tutor Approval
3	**Reading by reviewers**
3.1	Reviewers assignment Request
3.1.1	Assignment of two reviewers
3.1.2	Communication establishment
3.1.3	FGP Submission to reviewers
3.2	Reviewers Work
3.2.1	Review
3.2.1.1	FGP Reading
3.2.1.2	Reader 1 Report
3.2.2	Review
3.2.2.1	FGP Reading

3.2.2.2	Reader 2 Report
4	**Adjustments**
4.1	Report for reviewers
4.2	FGP Update
4.3	Second Review by Reviewers
5	**Presentation to Board of Examiners**
5.1	Final Review Board Meeting
FGP END	

Appendix 3: FGP WBS Diagram
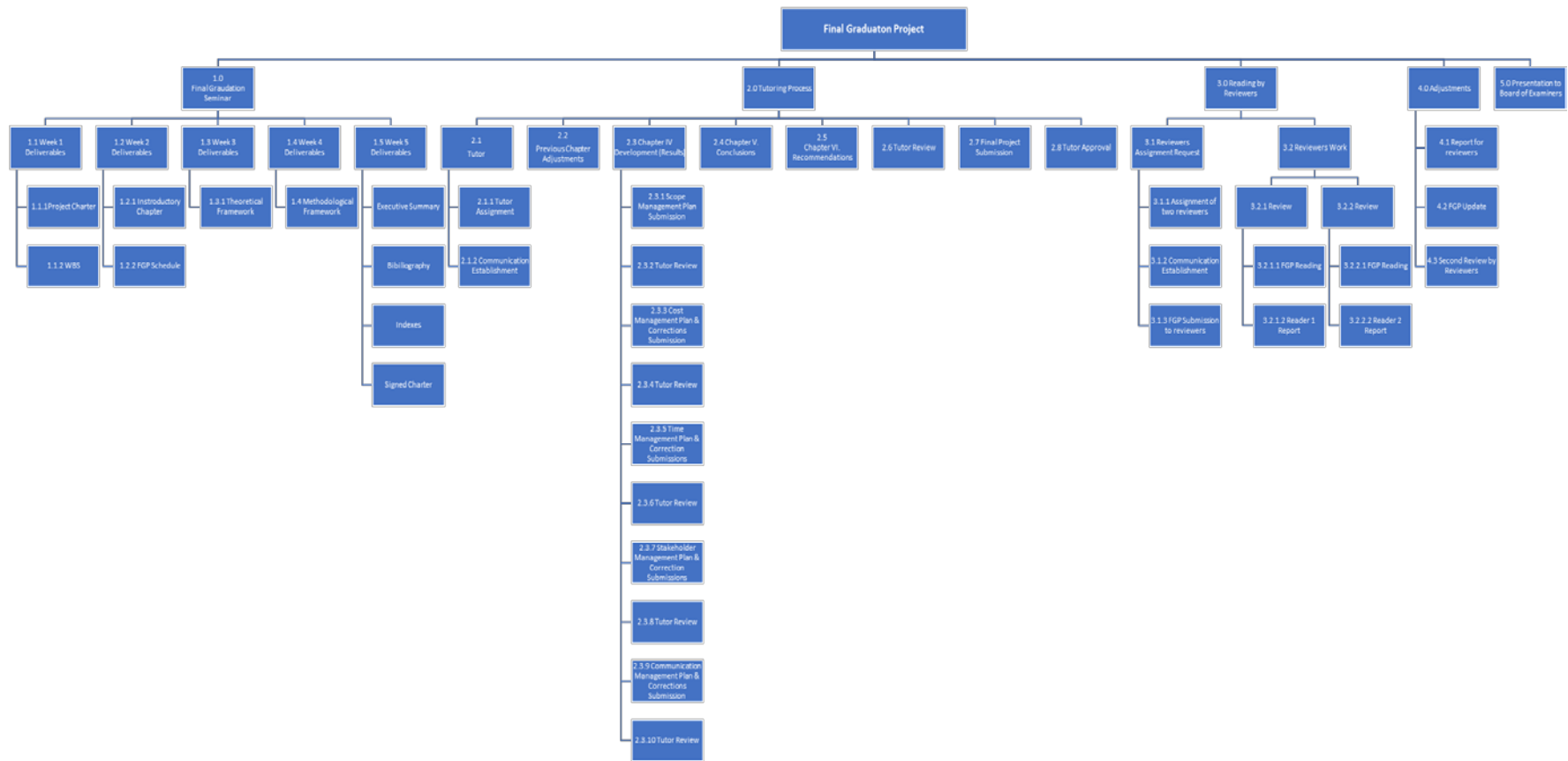
Appendix 4: FGP Schedule
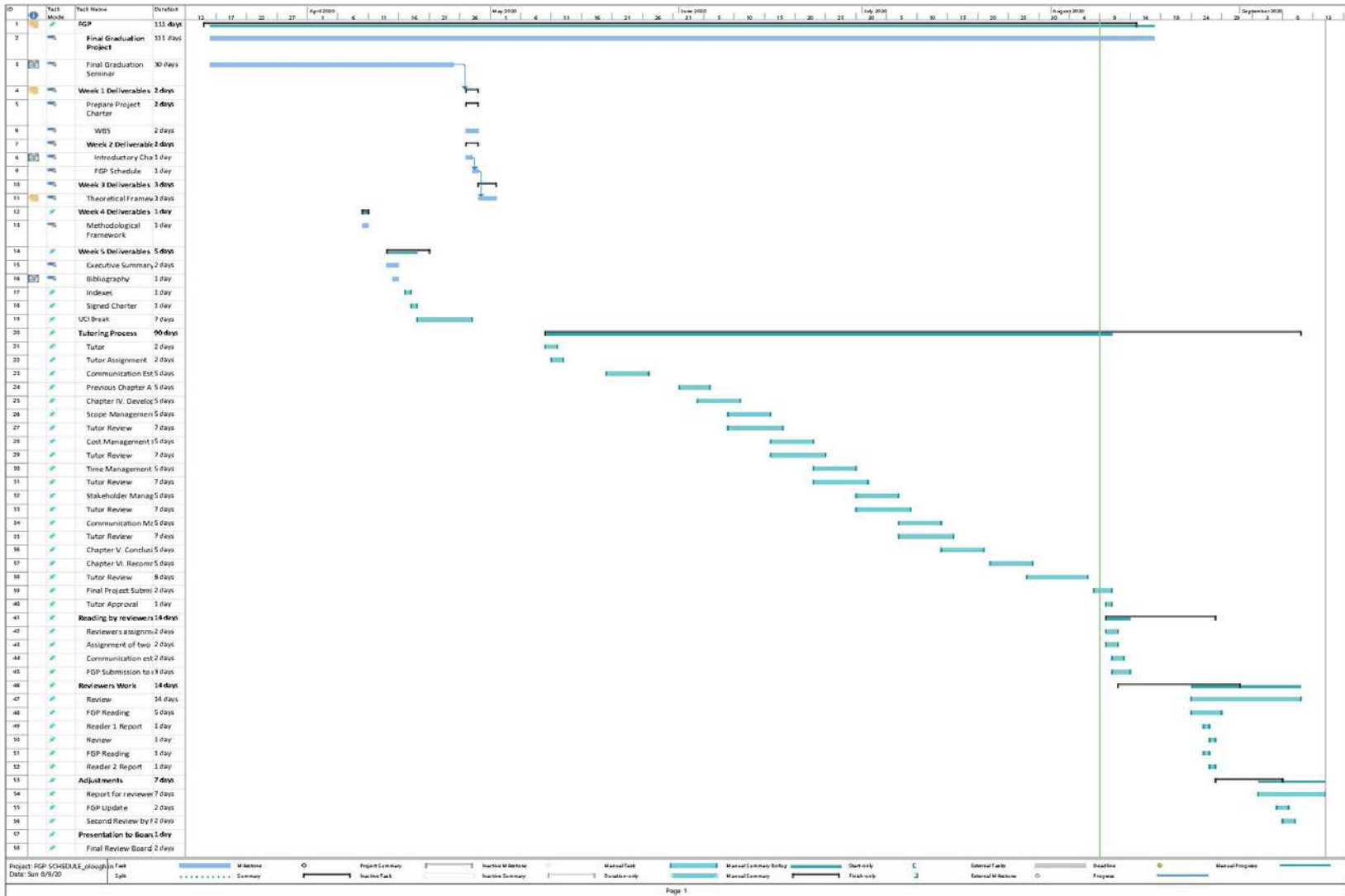
Appendix 5: Project Revision History Template

Revision History

Identify changes

Version	Date	Name	Description

Appendix 6: Project Deliverable Acceptance Form. (Source: ProjectManagementDocs.com)

DELIVERABLE ACCEPTANCE FORM

Deliverable Name	<Description of the deliverable to be accepted. These should be from the Scope Statement.>
Acceptance Criteria	<The criteria against which the deliverable will be judged>
Verification Method	<How will acceptance be verified by the project team?>
Validation Method	<How will acceptance be validated by the client (i.e. sponsor, customer, user acceptance group?)>
Client Name	<The name of the person responsible on the client's end for validating and accepting the deliverable>
Client Signature	
Signature Date	YYYY-MM-DD

Deliverable Name	
Acceptance Criteria	
Verification Method	
Validation Method	
Client Name	
Client Signature	
Signature Date	YYYY-MM-DD

Deliverable Name	
Acceptance Criteria	
Verification Method	
Validation Method	
Client Name	
Client Signature	
Signature Date	YYYY-MM-DD

Appendix 7: Requirements Traceability Matrix (Source: PMBOK Guide Sixth Edition)

		Requirements Traceability Matrix						
Project Name:								
Cost Center:								
Project Description:								
ID	**Associate ID**	**Requirements Description**	**Business Needs, Opportunities, Goals, Objectives**	**Project Objectives**	**WBS Deliverables**	**Product Design**	**Product Development**	**Test Cases**
001	1.0							
	1.1							
	1.2							
	1.2.1							
002	2.0							
	2.1							
	2.1.1							
003	3.0							
	3.1							
	3.2							
004	4.0							
005	5.0							

Appendix 8: Cause and Effect Diagram

CAUSES OF LOW MEMBER SATISFACTION

Appendix 9: Change Request Form for FNDECCU Rebranding and Restructuring Project

Action		Comments
Approve for Impact Analysis	[ ]	
Reject	[ ]	
Defer Until (MM/DD/YYYY)	[ ]	
Express Approval	[ ]	

3. Initial Impact Analysis			
Baselines Affected:			
Configuration Items Affected (e.g. product specifications):			
Cost / Schedule Impact Analysis Required? *(check one)*	Yes [ ]	No [ ]	
Rework Required? Describe:			
Impact on Cost:			
Impact on Schedule:			
Impact on Quality:			
Impact on Resources:			
Risk associated with Implementing the change:			
Risk associated with not Implementing the change:			
Impact on Business Value:			
Impact on dependent projects:			
Final Review Results:			
Review Date (MM/DD/YYYY):			
Priority: *(check one)*	High [ ]	Medium [ ]	Low [ ]

Appendix 10: Philology Expert Resume

Javid Buchanan

javid.buchanan@gmail.com
ja.buchanan (skype)
917.544.3202

PROFESSIONAL PROFILE

City University of New York Research Foundation, Bronx, NY   Present
Chatbot AI Communications Assistant
- Used Natural Language Processing (NLP) features to train Chatbot AI to interact and respond to student inquiries using English based platform.
- Facilitated chatbot functions as a live agent when the AI system inadequately responds to student inquiries.
- Coordinated with other chatbot administrators and chatbot users to define, establish, organize the preliminary testing of the conversational agent.

City University of New York Research Foundation, Bronx, NY   Present
Advanced English Language Reading-Writing Instructor

- Provide reading and writing instruction in preparation for the state exams, integrating math literacy, social studies and science lessons using critical reading strategies
- Create and implement engaging lesson plans and instructional strategies, including group instruction and one-on-one feedback.

City University of New York, **Hostos Community College,** Bronx, NY   2016 – 2019
Applications and Recruitment Support

- Administered workshops and seminars that highlight various academic opportunities, particularly to support English language and literacy skill development.
- Create and distribute print and electronic communications to promote events, activities, and degree programs for both current and prospective students
- Acted as a liaison for professionals working with the New York Department of Education and various Community Based Organisations (CBOs).
- Presented information about opportunities for prospective students, and helped incoming freshmen and transfer students with the application process.
- Compiled data from recruitment initiatives and other academic records to analyze student data and conduct statistical research to identify student population.

YMCA of GREATER NEW YORK CITY, New York, NY   2014 – 2015
Digital Language and Literacy Instructor

- Supported student and teacher use of human language technologies and applications that support psycholinguist developmental stages for secondary language acquisition.
- Evaluated the academic needs of the student population trying to develop linguistic, academic and computational skills. Developed effective student educational experiences that engage and stimulate student learning.
- Prepared classroom or designated area for instruction. Taught assigned class. Maintained open and effective communications. Used problem solving techniques to tactfully address and resolve questions and concerns. Helped students use computers, software programs.
- Collaborated with administrators to develop and implement the organisation's instructional technology goals. Worked with staff and students to promote computer literacy and advanced technology skills. Shared knowledge and resources that enhance student learning.

METROPOLITAN INTERPRETERS AND TRANSLATORS, INC. New York, NY   2004 – 2015

Linguistic Translation Database Manager
- Rendering foreign language documents to English and true and accurate translation of various source exhibits (documents, transcripts, audio, etc.).
- Faithfully conserving the style, tone, language level, and intent of the speakers
- Gathering and sorting translation documents, tapes etc., and written instructions.
- Assist stakeholders with federal government cases on behalf of the company by extracting electronic evidence, duplicating, storing, enhancing, and distributing files.
- Create detailed reports/logs for all digital data stored on optical discs/drives for managers to use to monitor translation and transcription process.

DEPARTMENT OF HOMELAND SECURITY, I.C.E Multi-regional, USA   2005 – 2012

Contracted Analytical Linguist/Transcriptionist (Metropolitan Interpreters and Translators)
- Managing interpreters and translators to decipher various accents, dialects and dictation styles; operating a word processor to input data.
- Using Agency operation guidelines, determine if raw data code words are pertinent or not pertinent.
- Developed and Implement flexible schedules for subordinate linguists.
- Assigned specific tasks to complete both, short term and long-term objectives
- Oversee employees working on TDY (Miami, Florida; Virgin Islands; Queens, New York) location sites, at secure government facilities.

NATIONAL EVALUATION SYSTEM INC, NYSTCE New York, NY   2003 – 2010

Assistant Test Administrator **(Operational)**
- Administer the **New York State Teachers Certification Examination**. Worked with administrators to secure the testing environment and all confidential materials. Ensure the secure transportation of confidential material and adhering to proper procedures of material

handling.
- Assist Supervising Test Administers with the surveillance of testing facilities, employees and examinees.

MORGAN STANLEY DEAN WITTER, Brooklyn, NY   2003 – 2004
Information Technology Mainframe Hardware Personnel
- Worked effectively with other IT departments, software Teams, and Vendors to stabilize mainframe infrastructure. Assisted in the commissioning and decommissioning of mainframe-servers CPUs, storage Devices, tape decks, etc.
- Replaced damaged connections after troubleshooting by testing cables, coaxes, fiber-optics for communication errors. Updated mainframe floor blueprints layouts, after every installation.

COMMUNITY AND VOLUNTEER SERVICE

Holistic Education Research and Conservation, St. Kitts-Nevis, West Indies   2018 – Present
Co-founder/Regional Academic Affairs Officer, Executive Committee (on-and-off island)
- Support all executive administrative functions including, but limited to, research design, grant writing, recruitment, and fundraising.
- Support educational outreach and collaboration through project and program development with local institutions/organisations (i.e. New Horizons Juvenile Rehabilitation Centre, Sustainable Development Council (SDC), Clarence Fitzroy Bryant College (CFBC), St. Kitts and Nevis Aquaculture Pilot Project and Environmental Research (SNAPPER), etc.)
- Develop mentorship projects through youth and community engagement by exploring anthropogenic impacts on the environment and promoting learning and awareness through data-driven and research-based practice.

YMCA d'haiti Foundation, Republic of Haiti, West Indies   2015 – 2019

English as Foreign Language program Coordinator
- Develop English language learning curriculum and teach EFL summer program.
- Address all aspects of communication through appropriate instruction that develops each student's ability to read, write, speak, and listen in the appropriate content area

YMCA d'haiti Foundation, Republic of Haiti, West Indies   2015 – 2019
STEM Literacy Program Coordinator and Administrator
- Develop STEM (Science, Technology Engineering, and Mathematics) summer program designed to teach youth STEM subjects using the Haitian Creole language. Provide STEM instruction in 10 sites to over a hundred students in the country.
- Coordinate with the International Services Director of YMCA-NYC and the General Secretary of YMCA-Haiti to establish goals for STEM program.
- Design curriculum, create budget, purchase and ship materials. Train volunteers and evaluate volunteers' work performance.

Literacy Partners New York, NY   2014 – 2015
Assistant Instructor
- Use human language technologies to teach language learning and literacy development
- Evaluate student performance using formal and informal assessment activities.
- Determine specific student needs and develop IEPs with parents and other personnel.

COLUMBIA UNIVERSITY, COMMUNITY IMPACT, New York, NY   2014 – 2015
Teaching Assistant/Tutor
- Prepare students for GED. Teach math. Review assignments from previous math class.

EDUCATIONAL PROFILE

City University of New York - CITY COLLEGE OF NEW YORK
Language and Literacy, M.A

Ca' Foscari University of Venice, Venezia, Italia
Post-colonial Languages and Literacy, Joint Masters of Arts

City University of New York - JOHN JAY COLLEGE OF CRIMINAL JUSTICE
Computer Information Systems, B.S

Human Subjects Research (HSR) Training

AWARDS, FELLOWSHIPS, ASSISTANTSHIPS

Ca' Foscari University, Department of Linguistics and Comparative Cultural Studies
Department of Excellence Award, 2018-2019

The City College of New York, CUNY
Opportunities in Research and Creative Arts Award, 2018

The City College of New York, CUNY
Marilyn Sternglass Language and Literacy Award, 2018

WRITTEN WORK, PRESENTATION & CONFERENCES

Buchanan, Javid, "Deconstructing Language Ideologies with Self-Reflective Writing in an EFL Classroom in Haiti: A Critical Discourse Analysis Case Study" (2019). *CUNY Academic Works.*
https://academicworks.cuny.edu/cc_etds_theses/794

Buchanan, J (2019) Deconstructing Language Ideologies with Self-Reflective Writing in an EFL Classroom in Haiti: A Critical Discourse Analysis Case Study. *CUNY Academic Works.*

Buchanan, J (2018) Teaching and Researching English In Multilingual Contexts: Heightening Awareness of Language Learning and Language Politics. Presented at ORCA Symposium, New York, NY

Alshidi, I, **Buchanan, J,** Rizzo, L, & Watson, M (2018) English Language Learners and the Politics of (Self) Assessment: Using Self-Reflective Writing Prompts for Second Language Learners. Presented at The power and possibilities of English TYCA Conference, Queens, NY

Alshidi, I, **Buchanan, J, &** Rizzo, L (2018) The Value of Assignments that Foster Self-Reflection in Second Language Writers. Presented at SUNY Council on Writing Conference, Farmingdale, NY

Buchanan, J (2018) The Relationship Between Language Politics and Literacy in Port-au-Prince, Haiti: A Preliminary Research Framework. Presented at Graduate Student Symposium, New York

Appendix 11: Philology Expert Letter

August 9, 2020

Academic Advisor
Master's Degree in Project Management (MPM)
Universidad Cooperación Internacional (UCI)

Dear Academic Advisor

Subject: Philological Review of Final Graduation Project (FGP) submitted by Markysa O'Loughlin in partial fulfillment of the requirements for the Master's in Project Management (MPM) Degree.

I, hereby, verify that the above-mentioned scholar has composed and edited the Final Graduation Project using the English language with academic proficiency. With that, I have conducted the philological review of this Master's thesis and I can attest to its adequate use of grammar, syntax, tone, format, and structure within its makeup.

J. Buchanan
Co-Founder - HERC -Holistic Education Research & Conservation
BCS; M.A (Language-Literacy/Postcolonial Languages and Literatures)