

PROJECT CHARTER

1. General Project Information				
Project Name:	Disney's Approach to Business Excellence			
Executive Sponsor:	Detroit Chapter of the Association for Talent Development (ATD Detroit)			
Budget:	\$53,650.00			
2. Project Manager & Team				
	Name	Board Role	Telephone	E-mail
	Esther Jackson	VP Programs & Events	000-000-0000	Estherljackson@hotmail.com
	Project Team			
	ATD Board Members & Meeting Coordinators			
3. Stakeholders (e.g., those with a significant interest in or who will be significantly affected by this project)				
ATD Detroit Board & ATD Detroit Chapter Membership				
Rochester College & Disney				
4. Project Goal				
Host an ATD Detroit Signature Event with Disney providing a one-day training program on Tuesday, October 17, 2017 at Rochester College for 200 attendees consisting of local chapter members and others. Complete registration for event based on the following fee structure as agreed upon by the ATD Detroit Board:				
Early Bird -- Members		6/30/2017	\$399.00	
Early Bird -- Non-Members		6/30/2017	\$449.00	
Early Bird -- Group (5) Members		6/30/2017	\$1,795.00	
Early Bird -- Group (5) Non-Members		6/30/2017	\$2,045.00	
After 6/30/17 -- Members		10/16/17	\$449.00	
After 6/30/17 -- Non-Members		10/16/17	\$499.00	
After 6/30/17 -- Group (5) Members		10/16/17	\$2,045.00	
After 6/30/17 -- Group (5) Non-Members		10/16/17	\$2,295.00	
5. Project Scope Statement				
Background & Description				
<p>For the last few years, the ATD Detroit Board has discussed the goal of hosting a signature event with Disney Institute for the ATD Detroit Chapter Membership and guests. The selected topic of Disney's Approach to Excellence is a combination of their three topics for custom business solutions: Leadership Excellence, Quality Service, and Employee Engagement. Disney shares their Engagement Model with a comprehensive approach that can be applied to all levels of an organization for any field or industry. Disney focuses on three core areas that operate as a system to deliver business results that can be self sustaining. The core areas are leadership, employee engagement, and service.</p>				

ATD Detroit Mission

To promote the growth of workplace learning and performance by providing members with professional development opportunities, targeted services, and relevant events that impact business goals.

Project Purpose / Business Justification

Hosting the Disney Signature Event would promote the mission of the chapter with professional development and the chapter's business operational goals. This event would also provide extensive exposure for ATD Detroit in various fields since Disney is one of the most recognized names in business solutions and professional development. There is a great opportunity for the chapter to profit with potential income in excess of \$10,000 from registration fees. This event would be a trigger point to promote the ATD Detroit name and brand to a greater level locally and nationally. Participation of ATD Detroit Board Members in the event can also positively impact the performance and operation of the board and chapter. The successful execution of this signature event can result in a momentum to propel the ATD Detroit Chapter into a new realm of achievement in membership, operations, and financial status.

Event Overview

The Mission of the Human Resources Department is to provide services and implement programs that attract, hire, retain and support a qualified and talented workforce committed to providing timely, high quality services to City of Detroit employees and citizens, in an environment that contributes to the City's objectives.

Objectives

- ❖ Obtain 75% board member participation
- ❖ Acquire \$9,000 or more from sponsorships to net a profit of \$3,600 after registration fees
- ❖ Reach registration goal of 200 registered attendees by 10/10/17
 - **Milestone: Achieve minimum of 57 attendees registered by First Deposit due date: 9/18/17 (Based on Early Bird Member Rate = \$22,743 for 57 registrations)**
 - **Milestone: Achieve minimum of 130 attendees registered by Second Deposit due date: 10/10/17 for break even point (Based on Early Bird Member Rate = \$51,870)**
- ❖ Submit submission of both deposits to Disney by deadline dates given
- ❖ Obtain a net profit of \$10,000 or more from event after expenses

Deliverables

- ❖ Disney Contract
- ❖ Venue Confirmation
- ❖ Disney Marketing Portal Access
- ❖ Marketing Plan
- ❖ ATD Detroit Registration Web Page

ATD Detroit SWOT Analysis

Strengths	Weaknesses
Chapter membership at 200+ Fully seated board to support event planning Active chapter w/history of successful events Effective and efficient operations from Meeting Coordinators	First time hosting event of this level Limited active chapter board participation Chapter lacks on-hand funds to cover full 50% deposit (must receive required number of registrations by 9/18/17) Chapter social media accounts just starting to become reactivated
Opportunities	Threats
Exposure for ATD Detroit on national level Establish benchmark for event of this level Profitability up to \$30,000+ Promote the ATD Detroit brand on broader scale Increase awareness to promote membership with ATD Detroit	Late execution of action plan Events that may be scheduled October 2017 Disney required approval and turnaround time Financial risk to chapter

Event Program Agenda

Planned Disney Training Location:

Rochester College
800 W. Avon Rd.
Rochester Hills, MI 48307

Time	Agenda Item
8:30 am – 9:00 am	Registration & Breakfast
9:00 am – 12:30 pm	Leadership Excellence, Brand Experience, and Employee Engagement
12:30 pm – 1:30 pm	LUNCH BREAK
1:30 pm – 5:00 pm	Quality Service and Innovation
5:00 pm	Program Closing

Scope & Budget Request Detail

This budget detail captures predetermined and some estimated expenses for holding the Disney Signature Event on 10/17/17.

Amount	Type of Expense	Product/Service Provider	Description
\$22,500.00 Due: 9/18/17	First Deposit for Program Fee (50%)	Disney	Program Fee 50% Deposit due 30 days prior to event which is 9/18/17; Payment to be made via USPS, courier, or wire transfer
\$22,500.00 Due: 10/10/17	Second Deposit for Program Fee (Remaining Balance)	Disney	Program Fee remaining balance (50%) due 7 days prior to event which is 10/10/17; Payment to be made via USPS, courier, or wire transfer
\$2,300.00 Due: 10/17/17	Lunch & Afternoon Snack during Program for 200 Attendees	Aladdin Food Service (Rochester College Caterer)	Box lunch with sandwich, side salad, dessert, soda/water PM Snack—chips, cookies, soda/water
\$700.00 Due: 10/10/17	Continental Breakfast during Program for 200 Attendees	Aladdin Food Service (Rochester College Caterer)	Bagels, muffins, danishes, fruit, coffee, tea, juice
\$1000.00 Due: 10/19/17	Airfare for 2 Disney Trainers	Airline	Disney handles air travel for trainers which is to be reimbursed to Disney by ATD Detroit; Roundtrip airfare for 2 Disney trainers traveling from various destinations
\$800.00 Due: 10/16/17	Hotel Costs for 2 Disney Trainers	Royal Park Hotel (2 Hotel Rooms for 2 nights)	Disney requires sponsor to make hotel arrangements; Hotel stay for 2 trainers to check in on day before event, 10/16/17, and check out on day after event, 10/18/17 at \$179 per night due to Rochester College referral by Jaymes Vettraino; Reservations made 3/15/17 w/Royal Park Hotel by Esther J.
\$350.00 Due: 10/19/17	Estimated Costs for Ground Transportation & Food for 2 Trainers	Disney	ATD Detroit to reimburse Disney for costs of food and ground transportation for 2 trainers during the timeframe 10/16—10/18/17
\$3500.00 Due: Varies	Estimated expenditures for Services, Equipment, Supplies, or other	Various	Estimation of additional expenses that may be unexpected (e.g. Meeting Coordinators, postage, ATD Detroit Board shirts for event, event banner/signage, backdrop, etc); IT Tech @ Rochester for \$35/hr (10-12hrs needed)

Options for Payment Submission to Disney

For Inquiries Please Contact: Suzanne Lopez-407-566-6647/Fax 407-566-7676 or [email: mrsdisney@disney.com](mailto:mrsdisney@disney.com)

All payment methods must include: Group Name--ATD Detroit, Group Booking Number (GMR #GGG0000), and "For DI Prgm."

Wire Transfer Information:

Bank of America
100 West 33rd Street
New York, NY 10001

ABA Number for Wire Payment: 00000000
Account # 00000000
SWIFT Address: BBBB BBBB
Amount in U.S. Funds
Payable to: Disney Business Productions, LLC
(Receiving Agent for Disney Institute)
Reference # 00000000

Payment Address Via USPS:

Disney Institute
Paula Keane
P O Box 0000
Lake Buena Vista, FL
32830 Reference Invoice
DISNEY000

Payment Address Via Courier (FedEx, UPS)

Disney Institute
Minnie Mouse
215 Celebration PL
Fourth Floor
Celebration, FL 34747
Reference Invo DISNEY999

Cancellation Policy:

- **60 or more days before program = 10% of program fee (\$4,500)—Prior to 8/18/17**
- **30-59 days before program = 25% of program fee (\$11,250)—Between 8/18/17 and 9/18/17**
- **Less than 30 days before program = 50% of program fee (\$22,500)—After 9/18/17**

6. Sponsors

Sponsorship Levels

In efforts to offset costs, organizations and companies will be contacted to extend invitations to participate in the conference as a sponsor as outlined below:

\$3000.00 Platinum Level Sponsorship – includes program registration fees for five (5) persons based on a non-member Early Bird rate, a vendor table at the event (if table space is still available), continental breakfast and lunch for the five (5) registrants, sponsor logo included in event marketing/promotional materials, and inclusion on ATD Detroit website

\$1500.00 Gold Level Sponsorship – includes program registration fees for two (2) persons based on a non-member Early Bird rate, a vendor table at the event (if table space is still available), continental breakfast and lunch for the two (2) registrants, sponsor logo included in event marketing/promotional materials, and inclusion on ATD Detroit website

Note: Venue has limited table space which would allow for up to six (6) vendor tables.

Potential Charitable Contributions from Sponsorships: Profit to ATD Detroit from -- Platinum \$755 = **\$151** per sponsor to Charitable Donation; Gold \$602 = **\$120.40** per sponsor to Charitable Donation

7. Required Resources

Money

- ❖ Catering Costs
- ❖ Marketing Costs
- ❖ Program Fee Deposits
- ❖ Travel Expenses (air, ground, etc)
- ❖ Hotel Expenses
- ❖ Other

Manpower

- ❖ Project Manager/Coordinator (Disney, Venue, Caterer, Registration, IT and A/V, etc)
- ❖ Marketing Coordinator (determine audiences, mediums, due dates, message types, give assignments, etc)
- ❖ Project Documents Coordinator (maintain and track contracts, plans, financial docs, etc)
- ❖ Sponsorship Coordinator (oversee sponsor packages, set up for sponsors at event, confirm registrations)
- ❖ Social Media Promoter/Coordinator (handles social media marketing avenues in conjunction w/Marketing Coordinator)
- ❖ Materials Coordinator (Name Badges, Certificates, Mailing Labels, Event Signage, etc)
- ❖ Registration Coordinator – Online & Venue for Event Day
(Meeting Coordinators: Jane—detroitdisney@atd.org or 999-999-0000)

Materials

- ❖ Marketing items, postage, flyers, mailers, gift bag items, ATD Detroit promo items, etc

8. Project Resource Contact List

Company	Contact	Purpose	Email/Phone
Disney	Minnie Mouse	Contacts for Signature Event coordination and marketing materials approval	minnie@disney.com 000-000-0000
Rochester College (Venue Coordinator)	Mickey Mouse	Contact for securing Rochester College and set up needs	mickey@rc.edu 000-000--0000
Rochester College (Event Reservations/ Coordinator for Caterer)	Winnie Pooh	Wants to be kept informed for all catering services we request from Aladdin	winnie@rc.edu 000-000-0000
Rochester College (Venue IT)	Daisy Duck	Needed for walk-thru w/Disney trainers on 10/16/17 and IT assistance all day on 10/17/17	daisyd@rc.edu 000-000-0000
Rochester College (PR Assistance)	Donald Duck	Communications and info needed for marketing	donduck@rc.edu 000-000-0000
Aladdin Food Service	Belle	Catering breakfast and lunch on 10/17/17	belle@aladdinfood.com 000-000-0000
Royal Park Hotel	Ariele	Point of contact providing discounted rate for 2 hotel rooms for trainers	ariel@royalparkhotel.net 000-000-0000

9. Disney Recommended & Requested Items & Schedule

Program Elements	Timing
1) Provide Disney Institute with weekly reports showing the number of registered participants for the Program	2 months before Program Date – 8/17/17 (only paid participants)
2) Provide Disney Institute with a diagram of the room for the event (featuring dimensions, seating, and positioning of A/V elements required by Disney Institute) and contact information for A/V tech	4 weeks before Program – 9/17/17
3) Submit boilerplate media release (approved by Disney Institute) to meetings sections of local newspapers and business journals	4 weeks before Program – 9/17/17
4) Begin publicity campaign with select newspaper, business journal, radio	3 weeks before Program – 9/26/17
5) Disney Institute contacts ATD Detroit to walk through details	2 weeks before Program – 10/3/17
6) Disney Institute ships materials based on registration estimate	1-2 weeks before Program – 10/3/17
7) Send advanced registration info to Disney Institute	1 week before Program – 10/10/17
8) DI Facilitators and A/V tech conduct room inspection	Day before Program – 10/16/17
9) Program presented	Day of Program – 10/17/17
10) Attendance verification: DI Facilitator and ATD Detroit sign form and fax to DI	Within 24 hours of Program Day
11) Submit any CEC requests to Disney Institute	Day after Program – 10/18/17

10. Evaluation

The success of this project will be evaluated throughout the project execution with special attention given during the status points below:

- ❖ 75 days prior to Early Bird Deadline date—confirm 75% or more of marketing literature has been submitted to Disney for approval (Attendee invite, press release, e-blast, social media posts, mailers, article, web page, etc)
- ❖ 60 days prior to Early Bird Deadline date—ensure goal has been met for mailers to be sent, e-blasts, social media posts, etc
- ❖ 45 days prior to Early Bird Deadline date—check registration, sponsorships, follow up w/marketing tasks for all board members
- ❖ 30 days prior to Early Bird Deadline date—check registration, sponsorships, follow up w/marketing tasks for all board members
- ❖ 7/18/17—check registration status for the 57 registrations needed to satisfy 50% deposit in 60 days
- ❖ 8/18/17—check registration status for same as above
- ❖ Week of 9/1/17--Follow up w/catering order, IT appointment for 10/16/17, venue set-up for room and sponsor tables, hotel rooms, and Disney
- ❖ Conduct the signature event without incurring any financial loss to the chapter
- ❖ Assess if it would be financially worthwhile and beneficial in other respects for the chapter to plan for a Disney event in 2018
- ❖ Conduct debriefing meetings following the event to determine lessons learned and complete the summative evaluation