

Project Kick-Off Worksheet

Thank you for choosing StarChapter! We appreciate you taking the time to complete this project worksheet. This will help us focus the kick-off meeting on what is important to you.

Please send your completed worksheet to projects@starchapter.com and include your availability for a 60-minute virtual meeting. StarChapter's office hours are 9am-5pm Eastern Monday-Friday. Please provide at least a few business days' notice of your availability to help us accommodate your schedule.

Your project will be assigned to a project manager when the completed worksheet and your availability have been received.

General Project Info

Organization name:

Organization mailing address:

StarChapter likes to offer training to new board members.

When will your next board transition take place?

How often does your board change?

Every 12 months

Every 24 months

Every 36 months

Other

Domain/URL:

Project lead contact

Name:

Email:

Preferred phone:

Additional project contact

Name:

Email:

Preferred phone:

Treasurer contact

Name:

Email:

Preferred phone:

Membership Management

Who should have access to the member directory?

The public Only members Only Admins

Member rosters should not include any personally identifiable information that is sensitive in nature, such as social security or credit card numbers. For privacy recommendations, please visit https://kb.starchapter.com/Privacy_Recommendations

Meeting/Event Management

List any meeting/event types. Also, describe any registration costs for members and non-members. If there are any major conferences or events, then please describe the details below.

Sponsors

Do you offer sponsorships for individual meetings?

Yes No

Does your organization have annual or website sponsorships or advertising space on your site?

Yes No

If so for either, please describe the sponsorship levels and costs for sponsorships.

eCommerce

StarPay was developed to give you the software you have come to depend on integrated with the payment processing you need. StarPay includes integrated functionality, simplified payments reconciliation, single source support, and more.

[Learn More about StarPay](#) | [Sign Up for StarPay](#)

If you accept credit cards online, please provide your official refund policy for donations/dues/registrations. This is part of PCI compliance. Learn more here:

https://kb.starchapter.com/PCI_Compliance_Overview

A Privacy Policy and Terms of Use are required for PCI Compliance. Do you already have these policies written for your current website?

Yes No

PCI compliance requires organizations to prominently display a mailing address and phone number on the connected website. Please list the billing phone number and address.

Will you ship any products?

Yes No

Sales Tax

StarChapter may be legally required to collect sales tax on various service fees related to StarChapter's service. If your organization is tax-exempt, StarChapter is required to have documentation on file. Within 60 days of sign-up or as soon as tax-exempt status is received, upload this paperwork within the Customer Account Area of your StarChapter system, as described here:

https://kb.starchapter.com/Upload_Tax_Exemption_Documents

Communication Management

Do your board members/admins have dedicated email addresses for the chapter?

Yes No

If so, please list these addresses.

StarChapter provides email services in the form of forwarders. We can create forwarders such as membership@yourdomain.org to go to board or committee members. If you would like us to create these, please list the forwarders and the email address they should go to. Here is a link to learn more about email forwarders: <https://kb.starchapter.com/Forwarder-or-third-party-email>

Email lists must be managed to remove invalid or unsubscribed emails regularly. High bounce rates on any mass mail may result in StarChapter's email services being temporarily restricted or disabled.

Do you maintain a non-member mailing list?

Yes No

Are you currently using a system to send out mass email communications?

Yes No

Site Design

StarChapter has worked with CPCU to create a layout specifically for CPCU chapters. We will integrate this with your local chapter logo. We can also incorporate images relating to your area, such as skylines, into the main slider. You may also choose to supply us with photos, at least 1920 pixels in width, which we can integrate.

Will you be providing photos for use in the website's home page slider?

Yes No

Your plan includes the purchase of stock photos. Please provide some keywords or themes so we can compile a customized selection for you to choose from.

Content Management

We will migrate selected content from your current website into StarChapter based on your priorities and plan limits. We will focus on core functionality and content. Some examples of core functionality would include:

- membership items (applications, dues, importing your members/non-members)
- setting up your upcoming meeting(s)
- sponsorships
- basic content (“About Us”, “Board of Directors”, “Contact Us”, “Join”, and “Home” pages)

If you have content that is out of date, only accessible with a password, or new content that needs to be added, then please describe the circumstances.

If you have social media accounts, please list the account and links below.

(Facebook, Twitter, LinkedIn, Instagram)

Will you allow job listings to be submitted? If so, by who? All job listings are subject to board approval before posting.

Members	Non-Members	Both	N/A
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Who can view job listings?

Members	Non-Members	Both	N/A
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Do you charge for job listing submissions?

Yes	No
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How long are job listings available?

30 Days	60 Days	90 Days	Other
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Do you want to migrate previous newsletters into the StarChapter system?

Yes	No
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If so, how many would you like migrated? What format are they currently in?

Additional Functionality

Please identify additional functionality not covered by this worksheet that is necessary for your website.

Target Launch Date:

Project timelines are determined based on the plan your organization selected at sign-up. This timeline (ranging from 6-10 weeks) begins when you meet with your project manager for a Kick-Off Meeting. Please reference the Welcome Email originally received, if you are uncertain of the standard timeline for your plan.