

April 2009

Project Name:	Raiser's Edge		
Project Manager:	Stephen McCoy	Project Sponsor:	John Kearsey
Project Director	Daraus Mirza	ITS Director:	
Start Date:	January 2008	End Date	December 2009
Project Metrics:	Milestone Schedule: <input checked="" type="checkbox"/> On track <input type="checkbox"/> Manageable slippage <input type="checkbox"/> Escalation Required		
	Other Issues: <input type="checkbox"/> None <input checked="" type="checkbox"/> Manageable <input type="checkbox"/> Escalation Required		
Project Communications	<ul style="list-style-type: none"> Monthly Steering Committee meeting 		

BROAD LEVEL REPORTING

Broad Project Description:

The Advancement Division needs the capacity to actively connect with graduates, donors, current and ex-staff, industry and vendors and to deliver benefits to these individuals and organisations so that they continue to engage with Monash. The core Advance CS system, implemented five years ago, underpins the Division's activities but deficiencies have been identified both at strategic and operational levels.

This is a multi-year program to rectify, complete and further develop applications supporting Donor, Alumni and Community Relations (DACR) Division. This project draws together the recommendations of a review completed in 2006. Project activities are also informed by the recommendations of the 2007 external review of the Advance system.

The external review will help in deciding whether to re-implement Advance CS or implement The Raiser's Edge 7 (RE7). After the review the steering committee recommended that RE7 be implemented.

Progress Achieved to Date:

- First level application support for Advance and its integration with corporate systems has been transferred to ITS.
- Project Steering Committee with representations from various stakeholder groups have been meeting regularly since July 2007. The steering committee has been dissolved and a new Raiser's Edge implementation committee will be established.
- A comprehensive review of the Advance database has been completed by an external consulting group and a recommendation has been rendered to the project team and the steering committee for a switch to a different alumni and donor database system [Raiser's Edge] to support the ongoing and future activities of the division.
- The project team has negotiated in conjunction with the University Solicitor's Office the legal agreement to implement The Raisers Edge. The agreements have been signed.
- A core project team for implementation is being put together with various necessary skills and expertise.
- New documentation for the project to reflex the change in direction has been drafted. Including, Project Charter, Risk Analysis, Budget and Blackbaud scope of work document. These documents are still to be finalised.
- Sessions with users for requirements gathering has been completed.
- Notification sent to SunGard that we no longer require AWC, AWA or Event licences.
- High Level Project planning meeting has occurred, details are almost finalised.
- Initial Project team training is in progress and will be completed on the 1/08/08.
- Initial data conversion map (excluding gifts, campaigns, funds, appeals) completed.
- Data conversion TR1 completed (included 9 key tables only). Issues identified and being resolved
- Scope of work signed off. A clause to extend data conversion time if necessary is included.
- A task plan for data cleansing activities was completed.
- Appointed project officer to work on data cleansing activities (start date 06 Oct 2008).
- Issued data to Blackbaud for TR2, includes all data (excluding gifts, campaigns, funds, appeals) and completed review of data conversion.
- Communications to project stakeholders and Advance users resumed.
- Monash issued data for TR3 (excluding gifts, campaigns, funds, appeals) to Blackbaud.
- Extensive detailed review of data cleansing activities has been undertaken.
- The design of Campaigns/Funds and Appeals has been agreed allowing corrective work to be started in Advance on allocations and gifts.
- Steering Committee re-convened.
- Addition of TR4 to project plan and adjusted implementation date.
- Blackbaud to deliver data conversion TR3. Monash and Blackbaud to review the success of this conversion and agree on any changes.
- UAT environment built.
- Monash and Blackbaud agree on structure of UAT test scripts.
- Prepare UAT training schedule and agenda.
- TR5 added to plan and signed-off.
- UAT Test scripts created some possible amendments.
- UAT testing commenced.
- TR4 Issued to Blackbaud. Subsequently delivered by Blackbaud and tested.

- Setup of The Raiser's Edge link in my.monash portal complete.
- UAT Completed
- TR5 Completed
- Preparation for training was completed, including initial user guide.
- Training of The Raiser's Edge users for pilot period completed.
- The Raiser's Edge was implemented within DACR System and Information Management team.
- Sign-off on Blueprints.
- Implementation RE7 for Pilot Period to selected Monash users.
- Draft procedure guides for Systems and Information Management team created.
- Communication to Advance and The Raiser's Edge users about implementation and system status.
- Project Officer recruited to team.
- Completed handover from Blackbaud project to support system.
- Completed Reporting manual, and training.
- Business Analyst recruited (start date 06/04/09). Draft proposal to recruit consultant integration specialist with The Raiser's Edge experience created. Consultancy agreement process in progress.
- Added Monash South Africa user to the user base, including introductory and reporting training.
- Demonstrated draft donor call management action track, to key DACR staff members.

Progress Achieved this Month

- High Priority post implementation data correction activities to be completed.
- Interim integration plan for new Alumni (Callista) drafted.
- Post Implementation reviewer appointed. Surveys sent out for completion. Final interview session scheduled.
- Draft implementation plan for roll-out of the prospect module and call management completed.
- Advance user accounts disabled and Advance no longer used in DACR operational activities. Communication to solicitor's office to terminate agreement initiated.

Progress Expected in the coming Month

- Communicate to users solutions to common issues and updated FAQ.
- Project website update and handover of items to support unit.
- Continue to work on the interim Callista integration process
- Development of integration strategy continues, includes review of On-line Giving & Community options.
- Update documentation to reflect data correction activity changes.
- Start work on the integration components of The Raiser's Edge.
- Post Implementation review to be completed.

DETAILED REPORTING**Issues for Escalation to ITS Directors:**

- None at this time

Other Comments:

- The Raiser's Edge pilot phase has begun.
- Project work will now focus on improvements to processes utilising The Raiser's Edge.

Deliverable / Milestone Table

Item ID	Item Description	Target	Actual or Forecast	Status:
		Finish Date	Finish Date	Complete In progress (% Complete) Not Started
1	• Negotiation with vendor	1 April 08	1 April 08	Completed
2	• Contract signed with new vendor	15 April 08	15 April 08	Completed
3	• The full project team is in place	21 April 08	06 Oct 08	Completed
4	• Agree on high level implementation plan	30 April 08	30 April 08	Completed
5	• Sign-off on Project Plan Document. • Sign-off on Scope of Work Document. • Sign-off Milestone 1	19 July 08	19 July 08	Completed
6	• Delivery of Introductory Project Team Training • Sign-off Milestone 2	29 Jul 08	1 Aug 08	Completed
7	• Delivery of Design Sessions • Sign-off on Business Process Blueprint Document • Sign-off Milestone 3	18 Aug 08	18 Aug 08	Completed
8	• Delivery of Conversion Mapping Design Session • Sign-off on Conversion Mapping Document for Test Run 1 • Delivery of a Project Plan Revision after Design. • Sign-off Milestone 4	26 Aug 08	26 Aug 08	Completed
9	• Delivery of Converted Test Run 1 Raiser's Edge Database. • Delivery of Test Run 1 Review Session • Sign-off Milestone 5	16 Sept 08	16 Sept 08	Completed
10	• Delivery of Updated Conversion Mapping Document after Monash University feedback from Test Run 1 • Delivery of Converted Test Run 2 Raiser's Edge Database. • Delivery of Test Run 2 Review Session • Sign-off Milestone 6	07 Oct 08	24 Oct 08	Completed
11	• Delivery of Updated Conversion Mapping Document after Monash University feedback from Test Run 2 • Delivery of Converted Test Run 3 Raiser's Edge Database. • Delivery of Test Run 3 Review Session • Sign-off Milestone 7	14 Nov 08	14 Nov 08	Completed
12	• Deployment of The Raiser's' Edge . • Delivery of User Acceptance Testing (UAT) Plan Document and assistance with development of User Test Cases. • Deliver End User Training Planning	17 Oct 08	31 Nov 08	Completed

	session and Training Agendas • Sign-off Milestone 8			
13	<ul style="list-style-type: none"> • Delivery of Updated Conversion Mapping Document after Monash University feedback from Test Run 3 • Delivery of Converted Test Run 4 Raiser's Edge Database. • Delivery of Test Run 4 Review Session • Delivery of Pre UAT Training • Delivery of Assistance During UAT • UAT Sign-off by Monash University • Sign-off Milestone 9 	3 Nov 08	16 Jan 09	Completed
14	<ul style="list-style-type: none"> • Delivery of Updated Conversion Mapping Document after Monash University feedback from Test Run 4 • Delivery of Converted Test Run 5 Raiser's Edge Database. • Delivery of Test Run 5 Review Session • Delivery of Updated Conversion Mapping Document after Monash University feedback from Test Run 5 • Delivery of the Final Conversion Raiser's Edge Database for live operation • Sign-off Milestone 10 	14 Nov 08	30 Jan 09	Completed
15	<ul style="list-style-type: none"> • Delivery of End User Training • Sign-off Milestone 11 	21 Nov 08	30 Jan 09	Completed
16	<ul style="list-style-type: none"> • Delivery of Go-Live Assistance • Go Live Sign-off by Monash University • Sign-off Milestone 12 	25 Nov 08	30 Jan 09	Completed
17	<ul style="list-style-type: none"> • Post Implementation Data Correction activities – High Priority Items 	31 Mar 09	31 Mar 09	Completed
18	<ul style="list-style-type: none"> • Development of Reporting Manual • Delivery of Reporting Training • Implementation of The Raiser's Edge Reporting • Disable selected advance user accounts 	2 Apr 09	2 Apr 09	Completed
19	<ul style="list-style-type: none"> • Map call management process into The Raiser's Edge • Implement Prospect Module in DACR • Draft call management user guide created • Initial training for prospect module and call management pilot • Begin pilot of prospect module and call management for DACR in Raiser's Edge 	1 Jun 09	22 May 09	In Progress (37%)
20	<ul style="list-style-type: none"> • Engage integration consultant • Integration strategy draft • Integration strategy plan • Detailed integration plan 	10 Jul 2009	26 Jun 2009	In Progress (25%)
21	<ul style="list-style-type: none"> • Interim Callista Extract 	31 May 2009		In Progress
22	<ul style="list-style-type: none"> • Complete prospect module manual • Train DACR staff in prospect module use • Train DACR staff on call management within The Raiser's Edge • Prospect module and call management 	27 Jul 2009	24 Jul 2009	Not Started

implemented.			
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Note: The original template table above contains sample data only. This should be removed/validated for the first report.

Milestone Slippage Notes. *Provide the following information. If a milestone/s has slipped or is likely to slip, provide:*

- A) Explanation of impact to the project and business.*
- B) Reason for slippage.*
- C) Corrective action planned to be taken, if any.*

Item ID	Milestone Slippage Notes.
19	<ul style="list-style-type: none"> A) The implementation of the prospect module will be delayed by one week. The recording of moves within The Raiser's Edge will be delayed by one week. B) Development of policy's, definitions and guidelines for the new processes have taken longer than originally anticipated. C) The start of the pilot period will have to be delayed by one week.
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