

## January 2009

|                        |  |                  |              |
|------------------------|--|------------------|--------------|
| Project Name:          | Advancement Systems Support  |                  |              |
| Project Manager:       | Stephen McCoy  | Project Sponsor: | John Kearsey |
| Project Director       | Daraus Mirza   | ITS Director:    | Jeremy Du Ve |
| Start Date:            | January 2008   | End Date         | January 2009 |
| Project Metrics:       | Milestone Schedule: <input type="checkbox"/> On track <input checked="" 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"> <li>Monthly Steering Committee meeting</li> </ul>   |                  |              |

### 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 & 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 & 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 & Blackbaud agree on structure of UAT test scripts.
- Prepare UAT training schedule & 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.

**Progress Achieved this Month**

- 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 information management team

**Progress Expected in the coming Month**

- Monash to Sign-off on Blueprints.
- Implementation of RE7 for Pilot Period to selected Monash users.
- Communication to Advance and The Raiser's Edge Users about implementation and system status.
- High Priority post implementation data correction activities
- Deactivate Advance users.

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

- None at this time

**Other Comments:**

- The data conversion work will take longer than expected. We have added an additional test run (four) and delayed go-live until January. This has been reflected in milestones with agreement from the vendor.
- Data conversion TR4 has been added to the project plan. Data conversion TR5 has been added to the project plan.
- 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<br>In progress (% Complete)<br>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       | <ul style="list-style-type: none"> <li>• Sign-off on Project Plan Document.</li> <li>• Sign-off on Scope of Work Document.</li> <li>• Sign-off Milestone 1</li> </ul> | 19 July 08  | 19 July 08         | Completed   |
| 6       | <ul style="list-style-type: none"> <li>• Delivery of Introductory Project Team Training</li> <li>• Sign-off Milestone 2</li> </ul>                                    | 29 Jul 08   | 1 Aug 08           | Completed   |
| 7       | <ul style="list-style-type: none"> <li>• Delivery of Design Sessions</li> <li>• Sign-off on Business Process Blueprint</li> </ul>                                     | 18 Aug 08   | 18 Aug 08          | In progress (95%)                                   |



|    |  |            |            |               |
|----|--|------------|------------|---------------|
|    | Document<br>• Sign-off Milestone 3   |            |            |               |
| 8  | <ul style="list-style-type: none"> <li>• Delivery of Conversion Mapping Design Session</li> <li>• Sign-off on Conversion Mapping Document for Test Run 1</li> <li>• Delivery of a Project Plan Revision after Design.</li> <li>• Sign-off Milestone 4</li> </ul>   | 26 Aug 08  | 26 Aug 08  | Completed     |
| 9  | <ul style="list-style-type: none"> <li>• Delivery of Converted Test Run 1 <b>Raiser's Edge</b> Database.</li> <li>• Delivery of Test Run 1 Review Session</li> <li>• Sign-off Milestone 5</li> </ul>   | 16 Sept 08 | 16 Sept 08 | Completed     |
| 10 | <ul style="list-style-type: none"> <li>• Delivery of Updated Conversion Mapping Document after Monash University feedback from Test Run 1</li> <li>• Delivery of Converted Test Run 2 <b>Raiser's Edge</b> Database.</li> <li>• Delivery of Test Run 2 Review Session</li> <li>• Sign-off Milestone 6</li> </ul>   | 07 Oct 08  | 24 Oct 08  | Completed     |
| 11 | <ul style="list-style-type: none"> <li>• Delivery of Updated Conversion Mapping Document after Monash University feedback from Test Run 2</li> <li>• Delivery of Converted Test Run 3 <b>Raiser's Edge</b> Database.</li> <li>• Delivery of Test Run 3 Review Session</li> <li>• Sign-off Milestone 7</li> </ul>   | 14 Nov 08  | 14 Nov 08  | Completed     |
| 12 | <ul style="list-style-type: none"> <li>• Deployment of <b>The Raiser's' Edge</b>.</li> <li>• Delivery of User Acceptance Testing (UAT) Plan Document and assistance with development of User Test Cases.</li> <li>• Deliver End User Training Planning session and Training Agendas</li> <li>• Sign-off Milestone 8</li> </ul>   | 17 Oct 08  | 31 Nov 08  | Completed     |
| 13 | <ul style="list-style-type: none"> <li>• Delivery of Updated Conversion Mapping Document after Monash University feedback from Test Run 3</li> <li>• Delivery of Converted Test Run 4 <b>Raiser's Edge</b> Database.</li> <li>• Delivery of Test Run 4 Review Session</li> <li>• Delivery of Pre UAT Training</li> <li>• Delivery of Assistance During UAT</li> <li>• UAT Sign-off by Monash University</li> <li>• Sign-off Milestone 9</li> </ul>   | 3 Nov 08   | 16 Jan 09  | Completed     |
| 14 | <ul style="list-style-type: none"> <li>• Delivery of Updated Conversion Mapping Document after Monash University feedback from Test Run 4</li> <li>• Delivery of Converted Test Run 5 <b>Raiser's Edge</b> Database.</li> <li>• Delivery of Test Run 5 Review Session</li> <li>• Delivery of Updated Conversion Mapping Document after Monash University feedback from Test Run 5</li> <li>• Delivery of the Final Conversion <b>Raiser's Edge</b> Database for live operation</li> <li>• Sign-off Milestone 10</li> </ul> | 14 Nov 08  | 30 Jan 09  | Completed     |
| 15 | • Delivery of End User Training  | 21 Nov 08  | 30 Jan 09  | Started (50%) |

|    |  |           |           |           |
|----|--|-----------|-----------|-----------|
|    | <ul style="list-style-type: none"> <li>• Sign-off Milestone 11</li> </ul>  |           |           |           |
| 16 | <ul style="list-style-type: none"> <li>• Delivery of Go-Live Assistance</li> <li>• Go Live Sign-off by Monash University</li> <li>• Sign-off Milestone 12</li> </ul> | 25 Nov 08 | 30 Jan 09 | Completed |

*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.*

| <b>Item ID</b> | <b>Milestone Slippage Notes.</b>  |
|----------------|---|
| 7              | <ul style="list-style-type: none"> <li>A) Not expected to impact project.</li> <li>B) Some changes have been deemed necessary.</li> <li>C) Documentation to be finalised now system is implemented.</li> </ul>                              |
| 15             | <ul style="list-style-type: none"> <li>A) Due to the adjustment of modules implemented on Jan 30 less initial training was required.</li> <li>B) See item A.</li> <li>C) Additional training will be scheduled in coming months.</li> </ul> |

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|---------------|---|
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