

June 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.

Broad Progress Achieved to Date:

- Formed Project Team
- Formed System Support Team
- Data Conversion project completed including five test data conversion processes
- Implemented Raiser's Edge in pilot mode at Monash University on January 30th 2009
- Rolled out reporting module for user base
- Expanded user group to include Monash South Africa
- Post Implementation Review has been completed
- Deactivated Legacy User accounts

Recent Progress Achieved:

- Draft procedure guides for Systems and Information Management team created.
- Communication to Advance and The Raiser's Edge users about implementation and system status.
- Demonstrated draft donor call management action track, to key DACR staff members.
- Interim integration plan for new Alumni (Callista) drafted.
- Draft implementation plan for roll-out of the prospect module and call management completed.

- Communicate to users solutions to common issues and updated FAQ.
- Presentation to Faculty Managers Group
- The first custom development has been installed into the hosted environment, ID Look-up which was sourced from a software development company in the UK.
- The project team co-ordinated some changes to on-line giving site through ITS development to support the Alumni appeal.
- Integration strategy development work continued and the second draft has been issued. The first draft project plan issued for this work has been issued.
- A User manual template has been created for delivering new manuals for functionality roll-outs.
- Post Implementation review has been completed.
- Request for 2010 budget prepared.

Progress Achieved this Month

- Specifications for interim Callista integration process proceeded through another iteration.
- Started pilot period for prospect module within the philanthropic relations team.
- Integration strategy delivered and presented to Corporate Business Systems, IAS, and DACR. Integration project charter to be developed by the MOBS team.
- Update to 2010 budget request prepared.

Progress Expected in the coming Month

- Presentation to Deans group
- Project website update and handover of items to support unit.
- Update of communications strategy
- Callista Extract to be developed
- Preparation for integration strategy development work
- Decommission legacy system.

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 implementing new modules of The Raiser's Edge within the Monash Community. It will also explore how to new business areas to the user base.
- Integration project is now beginning its preparation phase.

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	14 Nov 08	14 Nov 08	Completed

	Raiser's Edge Database. <ul style="list-style-type: none"> • Delivery of Test Run 3 Review Session • Sign-off Milestone 7 			
12	<ul style="list-style-type: none"> • 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 session and Training Agendas • Sign-off Milestone 8 	17 Oct 08	31 Nov 08	Completed
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	10 Jun 09	Completed
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	Completed

21	<ul style="list-style-type: none"> • Interim Callista Extract 	31 May 2009	31 Jul 2009	In Progress (50%)
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 implemented. 	27 Jul 2009	10 Aug 2009	Started

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) The developments of policy's, definitions and guidelines for the new processes have taken longer than originally anticipated. Additionally staff illness resulted in over a week in time lost during critical periods. C) The start of the pilot period will have to be delayed by one week.
21	<ul style="list-style-type: none"> A) The 2009 Alumni data will not be available within The Raiser's Edge until the later date. Contact with these Alumni will be delayed. B) It was hoped the previous extract could be adapted to be used for importing. Upon investigation the process broke down when trying to convert from Advance to The Raiser's Edge as there was no process for this. Additionally the BA required emergency leave before specifications were completed. C) The extract will be made a simple as possible to speed development time. Affected groups have been advised by email of the delay. An additional delay is possible, possible communication is being considered.
22	<ul style="list-style-type: none"> A) Currently prospect contact activity is recorded outside of The Raiser's Edge. This implementation will bring the data within RE7. There will be a one week delay in the availability of this data. B) Due to the delay of the pilot period the implementation date also had to be adjusted. C) The start date has been adjusted and affected staff notified. Retrospective data recording will be undertaken to ensure the delay does not affect data within the system.
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