

October 2008

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"> 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).

Progress Achieved this Month

- Completed review of data conversion TR2.
- 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.

Progress Expected in the coming Month

- Blackbaud to deliver data conversion TR3. Monash and Blackbaud to review the success of this conversion and agree on any changes.
- Monash to Sign-off on Blueprints.
- Blackbaud to build UAT environment.
- Monash & Blackbaud to prepare UAT test scripts
- Prepare UAT training schedule & agenda.

- Engage data cleansing vendors to assist on cleansing tasks.
- Data cleansing activities affecting Go-live to be completed.
- Monash to issue data conversion TR4 to Blackbaud.

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. It is possible that a TR5 may be required.

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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Delivery of Introductory Project Team Training • Sign-off Milestone 2 	29 Jul 08	1 Aug 08	Completed
7	<ul style="list-style-type: none"> • Delivery of Design Sessions • Sign-off on Business Process Blueprint Document • Sign-off Milestone 3 	18 Aug 08	18 Aug 08	In progress (50%)
8	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Delivery of Updated Conversion Mapping Document after Monash University feedback from Test Run 1 • Delivery of Converted Test Run 2 Raiser's Edge Database. 	07 Oct 08	24 Oct 08	Completed

	<ul style="list-style-type: none"> • Delivery of Test Run 2 Review Session • Sign-off Milestone 6 			
11	<ul style="list-style-type: none"> • 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	In progress (50%)
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	Not Started
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	Not Started
14	<ul style="list-style-type: none"> • Delivery of Updated Conversion Mapping Document after Monash University feedback from Test Run 4 • Delivery of the Final Conversion Raiser's Edge Database for live operation • Sign-off Milestone 10 	14 Nov 08	26 Jan 09	Not Started
15	<ul style="list-style-type: none"> • Delivery of End User Training • Sign-off Milestone 11 	21 Nov 08	30 Jan 09	Not Started
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	Not 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.
7	<ol style="list-style-type: none"> A) The UAT environment can not be delivered until the blueprint is finalised. B) Blueprint review is taking longer than expected. In particular finalising the Campaigns, Funds and Appeals component. C) An internal advisory group has been assembled to assist in the sign-off of blueprints.
11, 12, 13, 14, 15, 16	<ol style="list-style-type: none"> A) These milestones have been adjusted and a new milestone added. Go-live has been adjusted to 30 Jan 2009. B) The data cleanse and conversion workload is greater than anticipated. Configuration and design considerations are taking longer to finalise than expected.

	C) Milestones and project plan have been updated; discussion and further possible revisions are possible. Discussions with the vendor continue.
--	---

Distribution:	ITS Project Office - mailto: project.reports@its.monash.edu.au
Copy to:	ITS Director responsible