



MONASH University

THE RAISER'S EDGE 7 IMPLEMENTATION PROJECT

DRAFT PROJECT CHARTER

Project Register Number:

0000

Prepared by	Stephen McCoy, Daraus Mirza
Creation Date	28/10/2008
Last Updated	15/12/2008
Version No.	01.07

Table of Contents

1.	PROJECT RESPONSIBILITIES	1
2.	SERVICE RESPONSIBILITIES	2
3.	INTRODUCTION.....	3
3.1	Background.....	3
3.2	Overview	3
4.	OBJECTIVES	4
4.1	Strategic Objectives.....	4
4.2	Project Objectives	4
5.	BENEFITS	5
6.	SCOPE.....	5
6.1	In Scope – Phase 1	5
6.2	In Scope – Phase 2	6
6.3	Out of Scope.....	6
7.	SUCCESS FACTORS	6
7.1	Phase 1.....	6
7.2	Phase 2.....	7
8.	STAKEHOLDERS	7
9.	TECHNICAL FRAMEWORK	8
10.	RELATED PROJECTS	8
11.	APPROACH.....	8
11.1	Project Schedule	8
11.2	Development Strategy	9

12.	CONSTRAINTS	10
13.	RISKS	10
14.	COSTS / FUNDING ARRANGEMENTS	1
	14.1 Project Budget Summary	1
	14.2 Production Costs and Funding Agreement	1
15.	QUALITY PLAN.....	1
16.	COMMUNICATIONS PLAN.....	1
	16.1 Communications context (situation analysis).....	1
	16.2 Communications Objectives.....	1
	16.3 Target audiences.....	2
	16.4 Key messages	2
	16.5 Communication vehicles and activities.....	3
	16.6 Implementation plan	3
	16.7 Evaluation	4
	16.8 Resources (budget, staff, equipment).....	4
	16.9 Appendices	5
17.	RELEVANT LEGISLATION / POLICIES	5
18.	STAFF IMPACT / CHANGE MANAGEMENT	6
19.	ASSUMPTIONS.....	6
20.	CONSIDERATION BY ITS DIVISION SECTIONS.....	6
21.	APPENDICES.....	9
	21.1 Three Year Budget Projection	9
	21.2 Risk Management Plan.....	9
	21.3 Benefits Realisation Plan	9

1. Project Responsibilities

Steering Committee Executive

Name	Project Title	Organisational Unit
John Kearsey	Project Sponsor	Advancement Division
Daraus Mirza	Project Director	Advancement Division
Stephen McCoy	Project Manager	Advancement Division
Mark Whitty	IT Director	ITS Division

Steering Committee Members

Name	Business Title	Organisational Unit
Ron Fairchild (Exec Sponsor)	Vice President	Advancement Division
John Kearsey (Chair)	Divisional Director, Donor, Alumni and Community Relations (DACR)	Advancement Division
Daraus Mirza	Director, Research and Information Management, DACR	Advancement Division
Louise McCarthy	Director, Alumni Relations, DACR	Advancement Division
Katherine Matthews	Manager, Systems & Technical Operations	Faculty of Business and Economics
John Allen	Executive Director, VCP Foundation	Faculty of Pharmacy
Tim Stephens	Business Manager	Faculty of Information Technology
Jamie McDonald	Marketing & Recruitment Manager	Faculty of Law
Terry Hogan	Director, Client Services	Student & Community Services Division.
Mark Whitty	Manager, IAS Development Services	ITS Division
Sarah Newton	Director, Industry Engagement	Research Commercialisation

2. Service Responsibilities

Name	Task/Role	Organisational Unit
Mark Whitty	ITS Service Manager	ITS - Integrated Administrative Systems
Sue Birch	Business Analyst	Advancement – RE7 Implementation Project Team
Jacki Balon	Project Officer	Advancement – RE7 Implementation Project Team
Immanuel Vyas	Project Officer/Data Cleansing	Advancement – RE7 Implementation Project Team
Travis Stone	Systems Officer/Legacy Data	Advancement – Research and Information Management Team, DACR
Daraus Mirza	Benefits Monitoring	Advancement

3. Introduction

3.1 Background

In mid-2007 a review was commissioned to examine and recommend improvements to the Donor, Alumni and Community Relations Division's information technology systems. In particular, the review concentrated on the issues surrounding the continuing development and strengthening of the Advance C/S (Advance) application for fundraising support and relationship management. The end result of the review was to discontinue use of SunGard Advance and implement the Blackbaud Raiser's Edge 7 (RE7) system.

The focus of this project is to data cleanse and convert data from Advance and implement RE7.

3.2 Overview

The focus of the RE7 implementation project is to implement the standard RE7 hosted system and convert the data existing within Advance into the new solution. The expected timeframe of the project is approximately six months, pending a details project design.

The Donor Alumni & Community Relations (DACR) staff will be involved in the design and sign-off of the new system to ensure it will meet strategic and operational requirements. The scope of the project however is not limited to DACR requirements and includes the Advancement needs of faculty and other administrative divisions.

The initial phase of the project will focus on data cleansing and recreating the structure of the existing Advance data to meet DACR requirements within RE7. The initial implementation will not include interfaces to Monash University systems. Additional requirements for interfacing with Callista, SAP, On-line Giving & Research Master have been identified and will be targeted in the later stages of the project or the next phase.

The 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.

4. Objectives

4.1 Strategic Objectives

The strategic objectives of this project are:

Strategic Objective
Monash will actively engage Monash alumni in the development of the university and its relations with wider communities – Excellence and Diversity, Monash Directions 2025
Create a culture of philanthropy within Monash that results in increased financial support
Engage alumni in the Monash vision and contribute to the advancement of the university
Enhance the Monash University profile to improve engagement with key stakeholders, both internally and externally

4.2 Project Objectives

The RE7 implementation project seeks to establish a central, shared repository for donor, alumni and community relations associated historical, behavioural and statistical data. It will generate reports for internal and external stakeholders, such as the donors, faculties, central alumni relations unit, campaign management team, central donor relations team, marketing and communications groups, and research and information management unit.

The system will draw heavily on SAP and Callista data which will be imported. It may also be required to accept input from Research Master. In future, it may be necessary to import external data such as databases with donor profiles and donation patterns/capacity of prospective donors to the university.

The key project objective(s) is/are:

Key Project Objectives
A quantitative and qualitative evaluation of data records, focusing on data consistency, completeness and contextual information capture. In addition, data capture procedures, policies and tools will be assessed for their quality, consistency and completeness
Based on the assessment findings, implement a “going forward” strategy with collaboration with various stakeholders, including faculties, programs and divisions
Develop and implement protocols, policies and procedures for data integrity, accuracy and security as well as standard practice and use of the database
Develop a training program for an efficient and supportive structure

5. Benefits

The key project benefit(s) are:

Key Project Benefits
Monash University – for its impact on the University’s operational and strategic planning goals
Deans – for its impact on the faculties’ future development, donor, alumni and community relations
Faculties – to facilitate the achievement of the faculties’ operational plans, including manage relationships with faculty alumni
Alumni – to receive timely and accurate information and maintain a connection with the University
Donors – to receive appropriate reports and communication following their donation/s and maintain a connection with the University
Faculty Campaign Directors – to build and/or maintain relationships with various external and internal stakeholders, including donors
Alumni Relations – to maintain relationships with alumni, recognise achievements, develop alumni chapters and improve post-Monash experience
Donor Services Team – acknowledge, steward and recognize donors and supports of the institution
Research and Information Management Team – update and add new information in the system and provide relevant support to the campaign management team as well as various entities within DACR and the University

6. Scope

6.1 In Scope – Phase 1

- To clean up and enhance strategic data objects in Advance for conversion to RE7. This would include: donor & alumni entities, address details, giving history within Advance and giving purpose
- Finalise the quantitative and qualitative evaluation of data records, focusing on data consistency, completeness and contextual information capture
- Conclude the evaluation of data capture and use procedures, policies, and tools for maintenance of data quality, consistency, and completeness
- Explore ways for SAP and RE7 to communicate so that accurate and timely donation information is available via RE7. The building of the automated interface is out of scope for the current phase of the project.

- Continue to clean up data, enhance data quality and implement segments of Advance that are currently not-utilised and/or under-utilised with a view to data conversion into RE7
- Establish new relationship monitoring abilities within RE7 beyond the current Advance system.
- Develop and implement guidelines and systems in RE7 to protect data and ensure privacy
- Draft policy and procedures for use of the RE7 system
- Provide training and experience in use of RE7 to users. With a view to building a long term training plan for RE7 users in the university.
- Draft a comprehensive training program to support current and future users of the database (including training targeted at specific job functions and on-going refresher courses)
- Develop communication activities between DACR and other Monash University staff involved in interacting with the Monash community. This will include the establishment of a Monash RE7 user group community, and establishing links with other Australian universities.

6.2 In Scope – Phase 2

The following work will be completed after the successful implementation of the core of RE7. The major focus will be on business process enhancement and integration to other University Administrative systems.

- Automated integration to other Monash University administrative systems at Go-live (e.g. Finance, Callista, HR, Research Office, International Office).
- Implement a “going forward” strategy, collaborating with various stakeholders, including faculties, programs and divisions based on the assessment findings
- Develop and implement comprehensive policy guidelines for maintenance and utilisation of the database
- Establish process for continuous improvement of systems and processes for user satisfaction as well as safeguard of information
- Develop a standard donation recording system to start capturing all incoming support to the University
- Create an on-going training plan for all University RE7 users.
- Data cleaning of non-strategic data for go-live.
- Full Microsoft outlook email integration. Only outgoing mail will be tracked within RE7 without a Microsoft Exchange mail server.

6.3 Out of Scope

- University wide management of customer relationship activities

7. Success Factors

Successful completion of this project will be measured as follows:

7.1 Phase 1

- Conversion of existing Advance entities and associated donor transactions, relationships, mailing information and associated information

- RE7 will be easy to use and present a summary view of Alumni, Donor and Organisations.
- All interactions with the Monash community will be transparent to users within RE7.
- The data contained with the RE7 system will be accurate and have data integrity rules where practicable.
- Able to store the relationship details between Monash University, constituents and organisations.
- Facilitate communication via email, phone, mail and documents with constituents that is respectful and enhances the relationship with Monash University.
- Capable of managing events and for the storing of attributes, interests and individual characteristics and requirements.
- Enable reporting on constituent activities, interactions and profiles including organisations.

7.2 Phase 2

- All graduation records within Callista are represented appropriately within The Raiser’s Edge.
- That The Raiser's Edge reconciles to the Monash SAP system for Donor related accounts.

8. Stakeholders

The stakeholders for this project are:

Stakeholders	Critical/Essential/Interested parties
Deans, faculties and programs	Critical
Vice Chancellor’s Office - Industry Engagement - External Relations	Essential
Alumni	Interested parties
Donors	Interested parties
Advancement - Donor, Alumni and Community Relations Division	Critical
ITS Division	Interested parties
Advancement - Business and Resources	Critical

Stakeholders	Critical/Essential/Interested parties
Advancement – Marketing & Student recruitment	Interested

9. Technical Framework

RE7 production & quality assurance systems will be hosted externally by Blackbaud Application Hosting Services.

A two tier environment will exist for quality assurance testing (QAT) and production (PRD). This will allow us to ensure new processes are tested and functional before implementation.

RE7 requires exchange server for full email integration, only outbound email will be recorded directly within the system.

RE7 will be accessed over a secure Citrix connection.

The ITS Bulk email tool will be required for bulk email from RE7; this may be re-assessed at later stage.

10. Related Projects

Other projects that this project impacts/is impacted by are:

Project	Nature of Relationship Dependency(ies)
Integrated Collaboration Environment (ICE) – Lotus Notes	Email integration is required for RE7 and ICE is the university email project.
Call Centre (VOIP)	Ability to monitor and log calls within RE7, automation of call activities.
University-wide CRM system	Possible replacement of RE7. Likely relationships will be required for information purposes between the two systems.
Monash Oracle BPEL System (MOBS)	Will be used for the creation of automated integration processes after the initial implementation of RE7.

11. Approach

11.1 Project Schedule

The project is scheduled to begin at the start of the 3rd Quarter 2008. The key project milestones as per the agreement with Blackbaud are detailed below. All dates are projected completion dates.

Milestones/deliverables for this project are:

No	Milestone/Deliverable	Date
----	-----------------------	------

1	Sign-off on Project Plan Document. Sign-off on Scope of Work Document. Sign-off Milestone 1	19 July 08
2	Delivery of Introductory Project Team Training Sign-off Milestone 2	1 Aug 08
3	Delivery of Design Sessions Sign-off on Business Process Blueprint Document Sign-off Milestone 3	18 Aug 08
4	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
5	Delivery of Converted Test Run 1 Raiser's Edge Database. Delivery of Test Run 1 Review Session Sign-off Milestone 5	16 Sept 08
6	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	24 Oct 08
7	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
8	Deployment of The Raiser's' Edge. Delivery of User Acceptance Testing (UAT) Plan Document and assistance with development of User Test Cases. Delivery of Pre UAT Training Delivery of Assistance During UAT UAT Sign-off by Monash University Sign-off Milestone 8	31 Nov 08
9	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	16 Jan 09
10	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 9	26 Jan 09
11	Delivery of End User Training Sign-off Milestone 10	30 Jan 09
12	Delivery of Go-Live Assistance Go Live Sign-off by Monash University Sign-off Milestone 11	30 Jan 09

11.2 Development Strategy

The pre-packaged RE7 system has been purchased from Blackbaud.

Changes to the RE7 system will be very limited, based on initial blueprinting with Blackbaud consultants. Any requirement changes will need to fit within the project budget & timeline. It is expected that no customisation activity will be required initially.

Data cleanse and the creation of data structure where lacking will be completed by Monash University.

Blackbaud will convert the Advance data that has been cleansed into RE7.

The project team will oversee the quality assurance testing of the project. It is expected that DACR and faculty staff will be involved in the QAT process.

12. Constraints

The business staff core of the project team will be created from the Development Database Services staff transferred from within Business & Resources.

The initial implementation in 2008 will not exceed 15 concurrent logged in users at one time, it is expected up to 49 concurrent users will be supported in 2009.

It is not possible to implement an exchange server for full email integration within the time frame of the implementation project

13. Risks

The overall risk of this project is **HIGH / MEDIUM / LOW**.

The following high-risk areas have been identified.

HIGH Risk Factor	Likelihood	Impact
Members of the project team will become unavailable due to illness, leave or other circumstances.	Likely	Quantity and the timing of tasks that can be completed within the specified time period will be impacted.
There will be an organisational restructure within Advancement, Donor, Alumni and Community Relations	Almost certain	Due to the change in staff roles and responsibilities processes may need to be modified. This could create additional workload.

14. Costs / Funding Arrangements

A 3 year summary projection that details development and production costs.

14.1 Project Budget Summary

PROJECT COSTING SUMMARY



PROJECT ID:	
PROJECT TITLE:	Raisers Edge 7 Implementation
SUBMITTED BY:	Stephen Mccoy/Daraus Mirza
DATE PREPARED:	15-Dec-08
YEAR OF STRATEGIC PLANNING:	2008

<u>IT CAPITAL DEVELOPMENT BUDGET</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>TOTAL</u>
Salaried/Contract Staff:	116,518	275,784	254,713	647,015
Consultant Staff:	190,720	75,200	75,200	341,120
Software:	123,102	5,500	45,665	174,267
Hardware:	39,400	17,000	30,328	86,728
Other Costs:	0	30,000	20,000	50,000
SubTotal:	\$ 469,740	\$ 403,484	\$ 425,906	1,299,130
Funding Offsets:	\$ -55,000	\$ 0	\$ 0	-55,000
IT Capital Budget Submission:	\$ 414,740	\$ 403,484	\$ 425,906	1,244,130

14.2 Production Costs and Funding Agreement

Funding allocated to the ITS project budget. Expenditure from this budget must be agreed by the allocated IAS project manager and the project director. The DACR operational budget provides some support to project activities.

15. Quality Plan

The project will use the Monash University project management methodology to ensure a quality outcome.

We have selected an appropriate Business partner (Blackbaud) for the project, with experience at implementing RE7 at similar institutions. We also contact universities within Australia and Canada with experience in implementing RE7 to ensure we create a successful model of the system.

A QAT system will be created to allow for user testing.

Any changes to the project scope will need to be approved by the steering committee.

Detailed documentation for the project will be created and maintained for the duration of the project and system including project: charter, plan, and scope of work, system blueprint, policy and training guides.

A project officer will be appointed to implement the change management plan for the RE7 project.

Training of both the project team and system users are a key component of the project and no one will be allowed to use the system without appropriate training first.

16. Communications Plan

16.1 Communications context (situation analysis)

The context includes the history of previous donor and alumni databases.

The internal communications environment at Monash University is busy. There are always a large number of major projects underway, each with communications needs. The communications for this project therefore should be focused direct to the target audience wherever possible, rather than using general tools.

16.2 Communications Objectives

- To support the stakeholder groups by providing relevant and easy-to-understand information about the new database and the transition
- To create positive energy about the database that will encourage future use, greater participation and enhanced compliance
- To pre-empt or mitigate any issues or concerns of future users and influencers (see below)
- To encourage higher collaboration in sharing necessary data about donors and alumni
- To reinforce the data privacy protocols as well as the need to constantly update donor and alumni details

16.3 Target audiences

Influencers:

- VCG
- Deans
- Faculty Managers

Future users (i.e., people who will, in future, have a personal log on):

- Faculty representatives
- Advancement, specifically:
 - All DACR units
 - Vice-President (Advancement) and PA
 - Business and Resources
- External Relations (Office of the Vice-Chancellor)
- Industry Engagement (Office of the DVC (Research))
- Non-faculty aligned centres, institutes etc (e.g., MUARC, MUMA)

Business partners

- Corporate Finance
- Information Technology Services (ITS)
- Human Resources (HR)

General awareness:

- All other Monash staff

16.4 Key messages

Message summary	Influencers	Future users	Business partners	General awareness
“A new donor and alumni database system is being introduced”	✓	✓	✓	✓
“In the meantime, Advance will be used and supported”	✓	✓	✓	✓
“In any database, the accuracy of data depends on what is entered and how it is maintained”	✓	✓	✓	✓
Updates about project status, implementation details etc		✓	✓	
“Training will be provided to relevant users”		✓		
“The chosen system has a number of useful features specifically for you”		✓		
For more information about any aspect of the project visit or	✓	✓	✓	✓

contact				
“The privacy of data is always a priority”	✓	✓		✓
“The new system will have comprehensive policies and procedures”		✓		
Details about how Raiser’s Edge operates and how to use various modules		✓		

16.5 Communication vehicles and activities

- Project website including: project background, project reports, FAQs, contact details
- Email bulletins to target audience groups
- Presentations to key groups
- Updates from the Vice-President (Advancement) to VCG
- Implementation team meetings
- Global emails from the Vice-President (Advancement)
- Items in general Monash internal communications vehicles (Memo, My.Monash)
- Project reports
- Demonstration sessions
- Training sessions

16.6 Implementation plan

Activity	Primary target audience	Frequency	Commencing
Website updates	Future users	Monthly	August 08
Email bulletins	Future users	Monthly	July 08
Presentations to key groups	Future users, influencers	Irregular	July 08
Updates from the Vice-President (Advancement) to VCG	Influencers	Irregular	November 08
Implementation team meetings	Implementation team	Weekly	September 08
Global emails from the VP(A)	All	July, Nov, Feb	July 09
Items in general Monash internal communications vehicles	All	Quarterly	Nov 08
Project reports	Business partners	Monthly	June 08
Demonstration and design sessions	Future users	July-Sept 08	July 08

Training	Future users	See training plan	Dec 08
----------	--------------	-------------------	--------

16.7 Evaluation

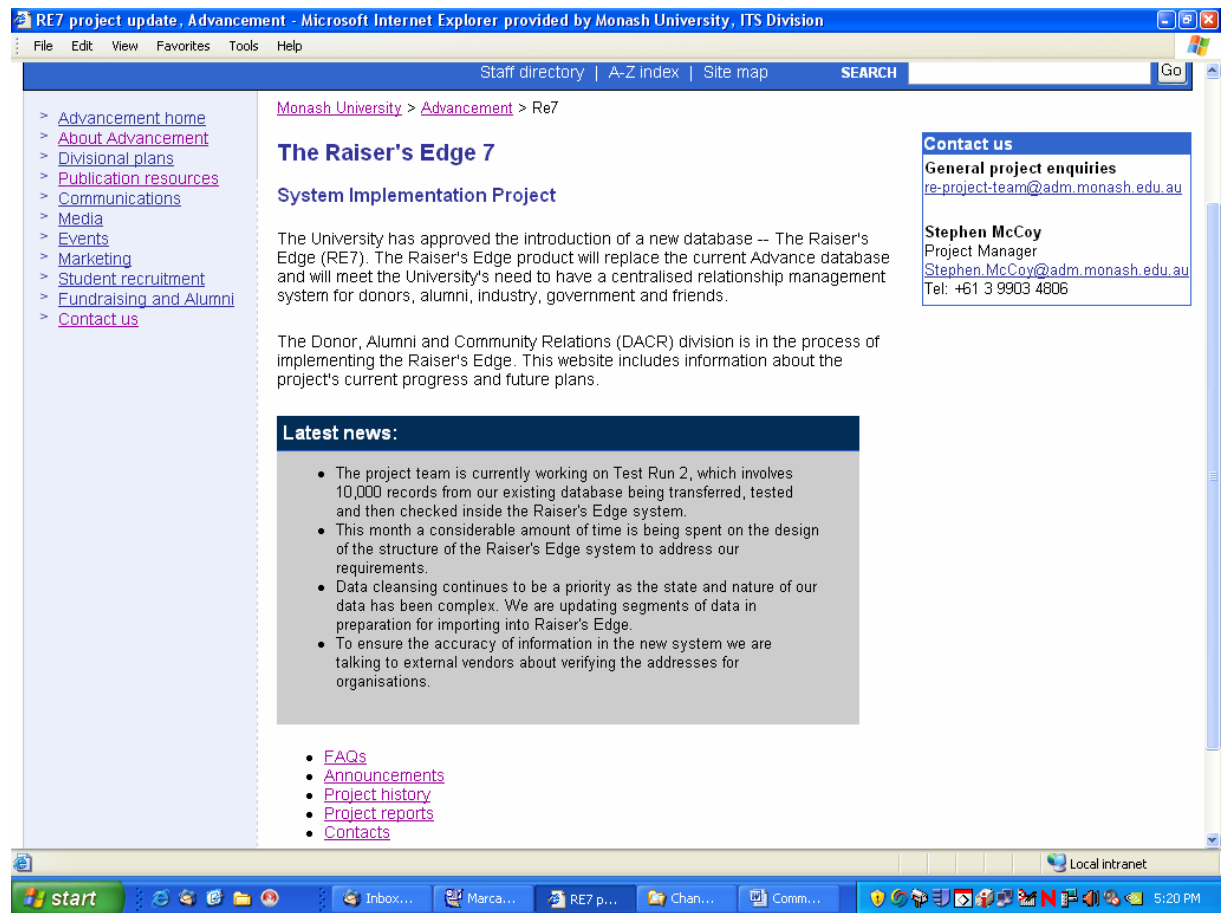
Qualitative and quantitative aspects of the communications objectives will be measured.

16.8 Resources (budget, staff, equipment)

Resources for the Communications Plan are within the project budget.

16.9 Appendices

The project website home page



17. Relevant Legislation / Policies

Monash University Privacy policy

Federal Government Email, SPAM and mobile marketing act

Victorian Government Information privacy act 2000

Monash University IT Security policy

Australian Direct Marketing code of practice

18. Staff Impact / Change Management

Organisational Impact Statement

The various stakeholders, including Advancement staff, faculties, and other users will be required to provide sufficiently detailed information and feedback to project staff to ensure that the system supports their specific data needs.

A key measure of the change management process will be that users log into RE7 on a regular basis for their Advancement needs rather than rely of excel spreadsheets that are exports of system data.

19. Assumptions

Key DACR staff will be made available to assist the project team.

Project Manager, Project Officer and Business Analyst will be available to the project on a full-time basis.

That only strategically relevant Advance data must be converted at go-live. A long term data cleansing and development process will be continued post go-live.

Automated interfacing to other Administrative systems will be completed in 2009; activities may begin in 2008 if time and funding are available.

20. Consideration by ITS Division Sections

Each Project Charter needs to be considered by all sections within ITS. The Project Office can assist with this, but it is the Project Manager's responsibility to drive the process. This process is not intended to achieve commitment; this needs to be handled with detailed and timely communication and may occur sometime after the initial Charter Development. However, getting each section to consider the Charter early in the project results in a more effective planning process and higher quality Charter document.

Department	Details
AS – Flexible Learning & Teaching	Discussed with: Comments: Date:
AS – Integrated Administrative Systems	Discussed with: Comments: Date:
AS – Web Resources & Development	Discussed with: Comments: Date:

CS – Client Communications	<p>Discussed with:</p> <p>Comments:</p> <p>Date:</p>
CS – Service Desk	<p>Discussed with:</p> <p>Comments:</p> <p>Date:</p>
IS – Identity & Messaging Services	<p>Discussed with:</p> <p>Comments:</p> <p>Date:</p>
IS – IT Security and Risk	<p>Discussed with:</p> <p>Comments:</p> <p>Date:</p>
IS – Network Infrastructure Services	<p>Discussed with:</p> <p>Comments:</p> <p>Date:</p>
IS – Shared Systems	<p>Discussed with:</p> <p>Comments:</p> <p>Date:</p>
IS – Production Facilities	<p>Discussed with:</p> <p>Comments:</p> <p>Date:</p>
IS – Enterprise Workstation Services	<p>Discussed with:</p> <p>Comments:</p> <p>Date:</p>
IM&SP – Project Office	<p>Discussed with:</p>

Advancement – Raisers Edge 7 Implementation Project

	Comments: Date:
IM&SP – IT Architecture	Discussed with: Comments: Date:
IM&SP – Information Management	Discussed with: Comments: Date:

21. Appendices

21.1 Three Year Budget Projection

Provided as a separate document

21.2 Risk Management Plan



V:\DACR\Research &
Information\Informat

21.3 Benefits Realisation Plan



V:\DACR\Research &
Information\Informat