

September 2009

Project Name:	Raiser's Edge		
Project Manager:	Stephen McCoy	Project Sponsor:	John Kearsy
Project Director	Daraus Mirza	ITS Director:	
Start Date:	January 2008	End Date	December 2011
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 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 was used to decide 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:

The Raiser's Edge pilot began in January 2009 and the system has been functional since then. The support team has been expanding the use of the system. In addition the project team has worked on three streams of work: functionality roll-outs, user expansion and integration.

Key future deliverables for the project are:

- Integration with Monash University administrative systems
- Roll-out of additional functionality
- Roll-out of new users to the system
- Increase the web site features available to the donor and alumni constituency

- 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 April 2009.
- 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.
- 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.
- Preparation for integration work started. Contact has been initiated with Student systems and ITS

MOBS group and Blackbaud. Start date to be confirmed.

- Conclusion of pilot of Raiser's Edge prospect module. Feedback has been collected and simplified process will be prepared for the business unit.
- Sent notification of Advance contract termination and received confirmation

Progress Achieved this Month

- Callista Graduation extract handed over for User Acceptance testing.
- Draft of update to communication strategy presented to Project sponsor for approval.
- De-activated Advance test system and verified resulting outcomes.
- Confirmed requirements for the archiving of Advance data with ITS security and internal audit division.

Progress Expected in the coming Month

- Callista extract Go-live
- Finalise preparation for extraction of Advance data for archive purposes.
- Extract Advance data and shut-down Advance database. Including separation of on-line giving systems from Advance database.
- Re-initiate implementation process for prospect module after modifications to prospect module have been agreed.
- Update to project website presence.
- Initiate Events module implementation project.
- Review of update to communications strategy to be completed.
- Update to Business Benefits documentation.

DETAILED REPORTING

Issues for Escalation to ITS Directors:

- None at this time

Other Comments:

- 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. Milestones associated with integration are draft dates and are still subject to approval. These milestones are now being affected by the continuing delay of milestone 21. Policy decisions are also required for work to start.

Deliverable / Milestone Table

See appendix A Milestone history for additional milestones

Item ID	Item Description	Target Finish Date	Actual or Forecast Finish Date	Status: Complete In progress (% Complete) Not Started
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 	1 Jun 09	10 Jun 09	Completed

	management pilot <ul style="list-style-type: none"> • Begin pilot of prospect module and call management for DACR in Raiser's Edge 			
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	02 Oct 2009	In Progress (95%)
22	<ul style="list-style-type: none"> • Review success of pilot period • 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 available in DACR. 	30 Jul 2009	18 Nov 2009	Started
23	<ul style="list-style-type: none"> • Prospect Post Implementation Review • Handover to Systems and Information Management team 	15 Sep 2009		Not started
24	<ul style="list-style-type: none"> • Advance De-commission <ul style="list-style-type: none"> ○ Correct previously reliant systems ○ Archive data ○ Shut-down Advance database 	15 Oct 2009	15/10/2009	In Progress (50%)
25	<ul style="list-style-type: none"> • Prospect Management: <ul style="list-style-type: none"> ○ Planned Giving ○ Annual Giving ○ Dashboard roll-out to DACR 			Not started
26	Integration for Callista and SAP Finance Planning and Initiation: Project Initiation Project Planning Finalize & submit to stakeholders Project Kickoff	13/08/2009 18/08/2009 24/08/2009 25/08/2009		Started
27	Integration for Callista Build Integration Appliance RE – Callista Integration Design Build and Unit Test Callista Integration System Integration Testing UAT Testing	18/09/2009 26/11/2009 17/12/2009 14/12/2009		Not started
28	Integration for Callista Build Deploy Callista Integration Raisers Edge Callista Integration Design Build & Unit Test Callista Integration System Integration Testing UAT Testing	2/12/2009 3/09/2009 11/11/2009 2/12/2009 17/11/2009		Not started
29	Integration for Callista Callista Interface Implementation (with BPEL) Implementation Planning Implement	21/12/2009 9/12/2009 21/12/2009		Not started
30	Integration for SAP Finance Build Deploy Finance Interface RE - Finance Integration Design Build & Unit Test Finance Integration System Integration Testing UAT Testing	14/12/2009 3/09/2009 22/10/2009 19/11/2009 14/12/2009		Not started

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

<p>Milestone Slippage Notes. <i>Provide the following information. If a milestone/s has slipped or is likely to slip, provide:</i></p> <p>A) <i>Explanation of impact to the project and business.</i></p> <p>B) <i>Reason for slippage.</i></p> <p>C) <i>Corrective action planned to be taken, if any.</i></p>	
Item ID	Milestone Slippage Notes.
21	<p>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.</p> <p>B) Working with variations with the data for Callista degrees is creating considerable issues with development of stable code.</p> <p>C) Consultation with Callista student systems has been increased to attempt to close any knowledge gap. Business analyst and developer are working closely to attempt to resolve the issues. Extract development was handed over for UAT on the 23/09/2009. Testing is expected to be completed 1/10/2009 and then ready to go-live.</p>
22	<p>A) Currently prospect contact activity is recorded outside of The Raiser's Edge. This implementation will bring the data within RE7.</p> <p>B) The feedback from the pilot period was that the process was too complicated. In discussing reporting and recording requirements the business unit director has requested holding the implementation and making adjustments to the implementation.</p> <p>C) Notification of implementation delay has been sent to affected stakeholders. Adjustments to the process have been completed and will be presented to the key stakeholder on 1/10/2009. Once signed-off a new implementation plan will be created. It should be noted some staff are able to use the prospect module now but the roll-out to the philanthropic team is currently on-hold.</p>
24	<p>A) Some systems will be inoperable without the Advance database available. Possible costs if database is required beyond the 15/10/2009</p> <p>B) There is no slippage yet, this is flag a possible slippage as the heavy dependency of systems may be difficult to correct in the next three weeks.</p> <p>C) Investigate appropriate prioritisation of work to minimise any impacts. Explore possible extension of shutdown date.</p>
26	<p>A) Delay to availability of functionality provided by integration.</p> <p>B) Due to the continued over run of milestone 21 activities relating to integration do not have sufficient resource available to initiate.</p> <p>C) Investigate methods to speed up implementation timelines if possible, such as sourcing development activities from the vendor as well as utilising ITS resources.</p>
Distribution:	ITS Project Office - mailto: project.reports@its.monash.edu.au
Copy to:	ITS Director responsible

Appendix A – Milestone History
Deliverable / Milestone Table

Item ID	Item Description	Target	Actual or Forecast	Status:
		Finish Date	Finish Date	Complete In progress (% Complete) Not Started
1	<ul style="list-style-type: none"> Negotiation with vendor 	1 April 08	1 April 08	Completed
2	<ul style="list-style-type: none"> Contract signed with new vendor 	15 April 08	15 April 08	Completed
3	<ul style="list-style-type: none"> The full project team is in place 	21 April 08	06 Oct 08	Completed
4	<ul style="list-style-type: none"> 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	Completed
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. Delivery of Test Run 2 Review Session Sign-off Milestone 6 	07 Oct 08	24 Oct 08	Completed
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	Completed
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 	3 Nov 08	16 Jan 09	Completed

	<ul style="list-style-type: none"> • 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 			
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
	<ul style="list-style-type: none"> • 			