MEETING AGENDA

- **DART demonstration** (45 min)
  - Road Show preview

- **DART timing & Change management** (15 min)
  - Project target date
  - Cut-off dates

- **Update on previous activities** (10 min)
  - Scorecard status
  - Training & testing survey
  - Umbrella homework

- **Action Items** (5 min)
  - Survey – Mass Communications & Donor Challenges
  - Communication toolkit
  - Scorecard

- **Break-out Sessions** (30 mins)
  - Supplemental systems action plans questions
  - Scorecard questions
DART ROADSHOWS

- August 8, 1-2:30pm - Palmer Commons
- August 11, 9-10:30 am - Wolverine Tower
  - Limited seats - Virtual session (Adobe Connect)
- August 15, 9-10:30 am - McKinley
  - Limited seats - Virtual session (Adobe Connect)
- August 16, 3:30-5:00 pm - Wolverine Tower
- August 24, 1-2:30 pm – McKinley

Register via Development Community Learning (DevNet)
MEETING AGENDA

○ DART Demonstration (45 min)
  • Roadshow preview

○ DART timing & Change management (15 min)
  • Project target date
  • Cut-off dates

○ Update on previous activities (10 min)
  • Scorecard Status
  • Training & Testing Survey
  • Umbrella Homework

○ Action Items (5 min)
  • Input Survey – Mass Communications & Donor Challenges
  • Communication Toolkit
  • Scorecard

○ Break-out Sessions (30 mins)
  • Supplemental Systems Action Plans Questions
  • Scorecard Questions
DART PROJECT TIMING & CHANGE MANAGEMENT
### Now through 2013: On-Ramp to DART

<table>
<thead>
<tr>
<th>PREPAREDNESS</th>
<th>DART SYSTEM IN PRODUCTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2011</strong></td>
<td><strong>2012</strong></td>
</tr>
<tr>
<td>Q1</td>
<td>Q1</td>
</tr>
<tr>
<td>Delivery of</td>
<td>End User Training &amp; Unit</td>
</tr>
<tr>
<td>DART features</td>
<td></td>
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<tr>
<td>by Blackbaud</td>
<td></td>
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<tr>
<td>ORRG Pilot</td>
<td>Production use of the</td>
</tr>
<tr>
<td>Goes Live</td>
<td>system</td>
</tr>
<tr>
<td>Q2</td>
<td>Q2</td>
</tr>
<tr>
<td>Comprehensive</td>
<td>Stabilization Period</td>
</tr>
<tr>
<td>Testing</td>
<td></td>
</tr>
<tr>
<td>Q3</td>
<td>Q3</td>
</tr>
<tr>
<td>Continued BEC</td>
<td></td>
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<tr>
<td>Pilot (Baby DART)</td>
<td></td>
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<tr>
<td>Q4</td>
<td>Q4</td>
</tr>
<tr>
<td>Pilot social media</td>
<td></td>
</tr>
<tr>
<td><strong>2013</strong></td>
<td></td>
</tr>
<tr>
<td>Q1</td>
<td></td>
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<tr>
<td>Q2</td>
<td></td>
</tr>
<tr>
<td>Q3</td>
<td></td>
</tr>
<tr>
<td>Q4</td>
<td></td>
</tr>
</tbody>
</table>

**Target:** March 26, 2012
# Resource Commitments

<table>
<thead>
<tr>
<th>Teams</th>
<th>April 2011-March 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Design Team members</td>
<td>196 hours (24.5 days)/person</td>
</tr>
<tr>
<td>Functional Area Design Team members</td>
<td>38 hours (4.75 days)/person</td>
</tr>
<tr>
<td>Testing Team members</td>
<td>102 hours (12.75 days)/person</td>
</tr>
<tr>
<td>Unit Liaisons</td>
<td>12-25 hours (1.5-3 days)/person</td>
</tr>
</tbody>
</table>

*This estimate is for efforts between August 2011 and Go Live. It is based on an average for meetings and homework activities. Larger units may require a greater effort. This estimate can be multiplied for additional team members. Larger units may have assisting with unit preparations for Go Live.*

Other members of the development community with business and/or technical expertise: 6 hours (.75 days)/person
RECENT/UPCOMING TRANSITION ACTIVITIES

- **Unit preparations**
  - Ensuring each unit has a plan for their systems and data at Go Live (Supplemental/Shadow systems)
  - Estimating training and testing needs
  - Grouping gift allocations for easier viewing and tracking in DART

- **Comprehensive testing**
  - Starts in September 2011, goes through January 2012
  - Objective: Verify that DART will handle all the business needs identified

- **Data conversion**
  - Ongoing effort, must be completed for comprehensive testing
  - Cleaning, preparing, and mapping data from DAC to DART
  - Must be a well-coordinated effort across campus
BUSINESS AS USUAL…. HOWEVER,

- Too many new changes jeopardize the project
  - The closer we get to Go Live, we will have some cut-off dates to minimize changes

- Routine business will continue through Go Live
  - 09/30/11 – Stopping modifications to the current DAC system

- Sent details with June Talking points
DART Change Management Update

**PREPAREDNESS**

<table>
<thead>
<tr>
<th>2011</th>
<th>2012</th>
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</thead>
<tbody>
<tr>
<td>Q1</td>
<td>Q1</td>
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<tr>
<td>Q2</td>
<td>Q2</td>
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<tr>
<td>Q3</td>
<td>Q3</td>
</tr>
<tr>
<td>Q4</td>
<td></td>
</tr>
</tbody>
</table>

- **Q1 2011**: Comprehensive Testing
- **Q1 2012**: Stabilization
- **Q2 2012**: Production use of the system

**PRODUCTION**

- **Q1 2012**: DART Goes Live
- **Q2 2012**: End User Training
- **Q3 2012**: Ongoing Training

- **Q1 2012**: Stabilization
- **Q2 2012**: Stabilization

- **Q1 2012**: Prepare for Go Live
- **Q3 2012**: Stabilization

- **UL Kick-off**
- **Unit Liaison Meetings & Work**: Identify System inputs/impacts, Who Needs Training & Access, Communicate/Share
- **Communicate Project Updates**: Newsletters, Talking Points, Demos, Meetings, Dev Council
UPDATE ON PREVIOUS UL ACTIVITIES
Scorecard Status – Overall Green
**Training & Testing Survey**

- Homework activity from May 20, 2011
  - Provide estimates for the number of people in your unit who needs training
  - Information will be used to start planning training logistics
  - More info coming in the fall

- Scorecards are marked for those unfinished

- Please complete after this meeting, if you have not submitted
GROUPINGS OF ALLOCATIONS (UMBRELLA)

- Homework activity from May 20, 2011
  - Review unit-specific data on relationships of allocations (endowments, expendables, quasi)
  - WINS – Related allocations are easily identified in DART.

- DART Team preparing to load all info into the system this summer
  - All of your hard work is helping to build the foundations of the system
  - Information you provided looks good from the initial analysis
  - Heard concerns for need for changes & exploring opportunities for increased flexibility to adjust groupings

- Comprehensive testing will occur Fall 2011 by dedicated test teams
Outstanding Questions from SCUs

- After completing my umbrella spreadsheet, my SCU added a new designation. How does this information get to the DART team?
  - DART team is working with FINOPs to update chartfields request form to capture the grouping information going forward
  - Small gap of time between May 2011 & when form updated
  - Will circle back to capture this information with ULs that are impacted (units with new shortcodes)
ACTION ITEMS
COMPLETE ONLINE SURVEY – DUE 8/22

- **How many mass communications did your unit send last fiscal year?**
  - Count all mass communications sent using data from a Development Services request, or a list that your unit obtains
  - *Examples include:* Newsletters, Alumni magazines, Kintera requests, surveys, etc.

- **Does your unit have donor challenges funded by your school, college, unit or a donor? If yes, how many?**
  - *Examples include:* Blavins Scholars Program in the Division of Student Affairs
COMMUNICATE

Communications Toolkit
- Key messages and information you can customize
- Forward DART update on to your team
- Record sent on scorecard

Scorecard
- Change Management Team will send updated scorecard file
- UL Complete & send back to dart-project@umich.edu
- DART team will send back PDF with your unit’s status (green, yellow, red)
- UL share PDF scorecard (has status) with your unit’s leadership
# UL Meeting Dates & Topics

<table>
<thead>
<tr>
<th>Meeting Date</th>
<th>Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct 7, 2011</td>
<td>Business process impacts</td>
</tr>
<tr>
<td>Nov 11, 2011</td>
<td>Training schedules</td>
</tr>
<tr>
<td></td>
<td>Access/training lists</td>
</tr>
<tr>
<td>Jan 20, 2012</td>
<td>Readiness assessment check-in</td>
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<tr>
<td></td>
<td>Business process final details</td>
</tr>
<tr>
<td>March 2, 2012</td>
<td>Go Live preparation check-in</td>
</tr>
<tr>
<td>April 13, 2012</td>
<td>Implementation check-in</td>
</tr>
</tbody>
</table>
BREAKOUT SESSIONS

Shadow & Supplemental Systems – Larry Chaffee & Hanah Wilkins
DART Scorecards – Lesly Saucedo, Kelly Doonan-Reed, Robin Sober
SHADOW & SUPPLEMENTAL SYSTEMS

- **Inventory:**
  - Approximately 150 systems, interfaces, batch legacy jobs, and reports
  - Of those, over 90 systems documented by Unit Liaisons

- **Process:** Evaluate all systems to determine what can be handled before Go Live

---

**Timeline:**

- **Jan-May**
  - Inventory
  - Items collected with campus input:
    - Unit Liaisons
    - Design Teams
    - DCC

- **May-June**
  - Triage
  - Items that can be resolved by existing or planned DART functionality

- **June-July**
  - Prioritize
  - Business Impact
    - Impact on Business Process
    - # of S/C/U’s and staff affected
    - Direct tie to [DART success criteria](#)

- **July-August**
  - Project Planning
  - Implementation Impact
    - Technical complexity
    - Resources needed to resolve
  - Evaluate + Adjust Project Plan
    - Project Leadership
    - DCC
    - Project & Design Core Teams