

DAC Replacement / DART Monthly Status Report

Summary Comments:

- Overall project is on schedule for completion of analysis activities in the beginning of September
- Conference Room Pilots will be completed the first week of September.
- The number of gaps that have been identified to date is more than expected, but none are “show stoppers”. Gaps vary from small changes to screens to larger ones such as handling our UM organizational hierarchy.
- Significant progress has occurred on gap documentation and estimating with Blackbaud. As of month end, gaps in 8 of the 17 functional categories are fully documented resulting in 423 gaps identified. We expect a similar number of gaps from remaining categories. In other areas, gaps are being identified as testing is completed on the requirements. Gap identification will be completed in September.
- Capital Committee / EO Approval process logistics were modified and are underway including:
 - Reviewed business case framework with Capital Committee at 8/26/08 meeting
 - Take full business case to Capital Committee at 11/5/08 meeting for review / approval

Fit-Gap Project Plan Overview

| Project Plan Progress | % Complete | Est Hours | Status | Comments |
|---|------------|-----------|----------|--|
| Phase 1 - Project Initiation & Setup | 91% | 2,294 | Wrap-up | Reposted developer position, still wrapping up long term technical training plan delivery methods. |
| Phase 2 - Fit-Gap Analysis | 74% | 4,353 | | |
| - Application Functional Testing | 89% | 2,357 | | |
| - Highest Priority Areas - 7 categories | 94% | 1,185 | Wrap-up | Wrapping up gap documentation and BB estimation of hours |
| - Secondary Priority - 5 categories | 85% | 629 | Wrap-up | Same as above |
| - Tertiary Priority - 5 categories | 81% | 543 | On-Track | Same as above |
| - Infrastructure & Interface Testing | 71% | 1,232 | On-Track | Wrapping up final testing in early September |
| - Data Conversion | 84% | 420 | On-Track | |
| - Document Results | 8% | 496 | Starting | |
| Phase 3 - Determine & Communicate Conclusions | 0% | 481 | Starting | |

Key Fit-Gap Statistics

| Fit-Gap Testing Area | # of Original Requirements | # of New Requirements | Total Requirements | Requirements Tested / Verified | % of Req's Tested |
|---------------------------------------|----------------------------|-----------------------|--------------------|--------------------------------|-------------------|
| Functional Fit Gap | 279 | 156 | 435 | 408 | 93.8% |
| Application Architecture / Technology | 193 | | 193 | 121 | 62.7% |
| Hardware Infrastructure Testing | 22 | | 22 | 19 | 86.4% |
| Project Mgmt Activities/Support/Other | 40 | | 40 | 30 | 75.0% |
| Totals | 534 | 156 | 690 | 578 | 83.8% |

Note: Gift Planning & Membership functional fit-gaps scheduled to finish week of 9/2. Remaining lower priority requirements will be finished in for all other areas in the first part of September.

Enterprise / Production Support Model Progress

| Description | Initial Mtgs. | Plan 1 st Draft | Review/Edit Draft | Final Plan | Sign-off |
|--------------------------------|---------------|----------------------------|-------------------|-------------|----------|
| Business Systems Analysis | Completed | Completed | In progress | In progress | |
| Application Development | Completed | Completed | In progress | In progress | |
| Help Desk / Production Support | Completed | Completed | In progress | In progress | |
| Performance Support / Training | Completed | Completed | In progress | In progress | |

- Draft plans for all four areas has been completed and are in the process of review and finalization.

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Progress / Accomplishments over the last month:

- Completed Conference Room Pilots (CRP's) for two groups / six functional categories
- Held meetings with subject matter experts (SME's) and wrote test scenarios for 5 categories
- Made progress on infrastructure testing per plan.
- Follow-up meetings held and reviewed areas of BI & Reporting, High Level Data Model, and Enterprise Model
- Meeting held with Blackbaud to begin discussion of implementation options and initial direction needed to come up with estimates and costing for business case proposal.
- Conversion scripts were completed by Blackbaud and transferred to the UM environment.
- Reviewed Blackbaud on-line help capabilities and evaluated for possible performance support tools
- Proposed Business Case outline was taken to Capital Committee for review and comment.
- Met with Blackbaud to begin discussing implementation options for the Fit-Gap Business Case cost analysis and implementation plan

Upcoming Activities

- Functional category Conference Room Pilots (CRP's) for remaining two groups in the first week of September. Also adding a CRP for matching gifts during that week.
- Meeting(s) with Athletics to make sure any specialized requirements are represented in the Fit-Gap analysis.
- Complete definition of gaps in completed category test scenarios for use by Blackbaud in estimation of effort
- Completion of infrastructure testing by 2nd week in September
- Completion of data model and conversion testing activities by 2nd week in September.
- Conclude direction with BI / Reporting sub-group to finalize analysis and determine options
- Work on sections of business case deliverables and write up to be used in Capital Committee presentation

* Footnotes to Key Fit-Gap Statistics

- Original Requirements – From the original RFP and were broken out for Fit-Gap analysis
- # of New Requirements – Requirements added during the process of Conference Room Pilots (CRP) meetings with Subject Matter Experts or during testing.
- Requirements Tested / Verified – For functional categories, this includes all requirements in categories that have gone through CRP's. For other areas these are individual requirements that have been tested or verified by the assigned test team.