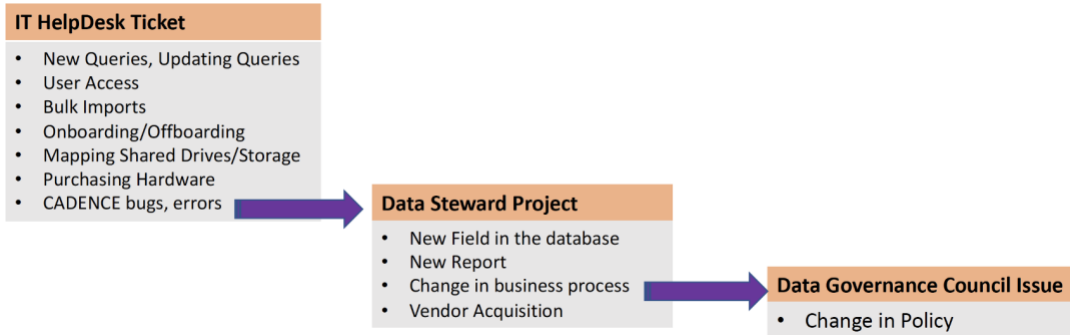


# IT CHANGE MANAGEMENT REQUEST



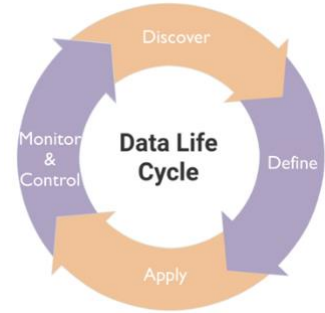
## SMARTSHEET (Project Management List) of Open Data Steward Issues

Issue Title	Phase	Assignee	Description	Progress	Start Date	End Date	Duration
TicketMaster Data into CADENCE - Daily IPTAY Import	Define	Patrick Marsden	Daily gift import batch - updated through the 19th	<input type="checkbox"/>	In Progress	02/22/23	02/22/23 1d
Sponsor & Stakeholders	Discovery	Patrick Marsden	Wesley, Patrick, Larissa, James, Austin	<input checked="" type="checkbox"/>	Completed	02/22/23	02/22/23 1d
Current State Documentation (Gaps, ROI, Impact, Data Audit)	Discovery	Patrick Marsden	Provided	<input checked="" type="checkbox"/>	Completed	02/22/23	02/22/23 1d
User Requirements	Define	Tennell James	Change Management Request created	<input type="checkbox"/>	In Progress	02/22/23	02/22/23 1d
Tech Specs	Define	Patrick Marsden	1st - query outputs / csv files for each of the three fil	<input type="checkbox"/>	In Progress		
IT Development (PBI)	Apply	James Huff		<input type="checkbox"/>	In Progress		
Functional Testing (Programmers)	Apply	James Huff		<input type="checkbox"/>	Not Started		
User Acceptance Testing	Apply	Patrick Marsden		<input type="checkbox"/>	Not Started		
Deployment Plan	Apply	Patrick Marsden	IT, GM, IPTAY to each create process doc and uploar	<input type="checkbox"/>	Not Started		
Publish/Communicate process docs, glossary terms, training	Apply	Heather Dromm		<input type="checkbox"/>	Not Started		
Monitor and Control	Monitor	Austin Morrison		<input type="checkbox"/>	Not Started		

## STEPS TO CHANGE (in order)

CHANGE MANAGEMENT WORKFLOW	PHASE
Title & Description	Discovery
Sponsor/Stakeholders	Discovery
Current State	Discovery
User Requirements (Sponsor Approves)	Define
Technical Spec (Sponsor Approves)	Define
IT Development (PBIs)	Apply
Functional Testing (Programmers Approves)	Apply
User Acceptance Testing (Sponsor Approves)	Apply
Deployment Plan (Sponsor Approves)	Apply
Publish/Communicate process documents, glossary terms, training	Apply
Monitor and Control	Monitor & Control

# PROJECT NAME: Change Management Request



**Version:** 1.0  
**Reference:** Ticket# 15920  
**Sponsor:** Karmen Sutton  
**Stakeholders:** Karmen, Amy, Shaw, Austin  
**Glossary Terms:** Active Donor, LYBUNT, SYBUNT

## Executive Summary (Description... what/why)

The Digital Fundraising Developer has been tasked to provide industry standard metrics so that Advancement can be strategic with marketing, communication, and solicitation efforts. After researching industry standards and considering Clemson's current resources, we will focus on these metrics at this time:

1. Monthly online transactions
2. Monthly webpage (hits/clicks) activity

## Current State (Process docs, challenges)

- There is not a regular/monthly report that shows a total picture of mass email from Advancement.
- Annual Giving creates monthly reports on appeal performance, listed here...
- Link Process Documents

 **Sponsor approves current state** 

## Scope (of this version)




- What's included/excluded (ie. events)

## Requirements (What does it need to do/show)

- User Requirement
- System Requirements
- Compliance Issues

 **Sponsor approves requirements** 

## Proposed Solution

- Description of programmatic change
- Impact on Current Processes, Policies, or Business Rules   
- Service Level Requirements

 **Sponsor approves solution** 

## Testing Plan

DISCOVERY

DEFINE

- Functional Testing (Programmers)

 Programmer approves developed solution 

- User-Acceptance Testing (BA's and stakeholders)

 Sponsor approves final solution/deployment plan 

## Deployment Plan

- Conversion/Upload of data (data clean up, bulk import, etc.)
- Scheduling of jobs/timeline (PBIs, assignments for stakeholders)
- Publish/Communicate process documents, glossary terms, training

 Updated process documents (including business glossary terms) shared in 5-in-5 eNewsletter 

## Monitor and Control

- What's the follow up? Annual integrity check? ROI Review, What other measurables?
- Move list of edits/nice-to-have's to future iteration(s) when appropriate