



Education and Compliance RAPID Enhancements	
Project Plan Updated	09/06/21
Target Completion Date:	11/30/22
Owner:	Jo Ann Del Gatto
Support Personnel	<ul style="list-style-type: none"> <li>• E&amp;C Team</li> <li>• Information Technology</li> </ul>
Scope:	<p>This project will result in improved efficiencies in the Education &amp; Compliance Department through the implementation of enhancements to CAS.</p> <p>RAPID projects will include:</p> <ul style="list-style-type: none"> <li>• Prioritization, design, and implementation of high-value SLIP and RAPID enhancements vetted by E&amp;C such as additional reports, screen layout and feature updates, and tighter integration with the CDI for Broker licensure data. Specific projects include:</li> <li>• RAPID - AVR Management/Voting Feature – Phase 2</li> <li>• Facilitator recruiting and management functionality including upload to CDI</li> <li>• Venue management database</li> <li>• Integration of DocuSign for all forms and documents</li> <li>• Education Dashboard - Tableau</li> <li>• On Demand Courses <ul style="list-style-type: none"> <li>○ Automation of certificates</li> <li>○ Reporting</li> <li>○ Tracking in RAPID</li> <li>○ Reminders</li> </ul> </li> <li>• Attendance consolidation and management</li> </ul> <p>E&amp;C will work with IT to review and prioritize previous and new feature requests, design system changes, test and validate the changes both prior to - and after - promotion to the production environment.</p>
Vendor (Y/N):	Y Kikoda, LLC
Budget:	\$200,000
Budget Line Item(s) Where Funding Exists:	6284 - Software Support
Benchmark:	<p>Benchmarks will be measured through increased quality and efficiency in current E&amp;C processes. The ability to provide new value-added services that reinforce CDI requirements will also benefit the membership, thereby increasing customer satisfaction.</p> <p>Following an Agile methodology, releases will be scheduled every six to eight (6-8) weeks depending on scope of changes scheduled. Approximately six (6) release cycles during 2021 fiscal year.</p>



<b>Review Dates:</b>	<ul style="list-style-type: none"> <li>• Four-Six (4-6) weeks – cycle development</li> <li>• Quarterly – tracking to fiscal year</li> </ul>				
<b>Benchmark</b>	<b>Dependency</b>	<b>Status</b>	<b>Start</b>	<b>Finish</b>	
Cycle 1 <ul style="list-style-type: none"> <li>- Define scope</li> <li>- Document requirements</li> <li>- Develop</li> <li>- Test</li> <li>- Deploy</li> </ul>	Internal Staff and Vendor	Not Started	12/1/21	01/31/22	
<b>Comments:</b>					
<b>Benchmark</b>	<b>Dependency</b>	<b>Status</b>	<b>Start</b>	<b>Finish</b>	
Cycle 2 <ul style="list-style-type: none"> <li>- Define scope</li> <li>- Document requirements</li> <li>- Develop</li> <li>- Test</li> <li>- Deploy</li> </ul>	Internal Staff and Vendor	Not Started	02/01/22	03/14/22	
<b>Comments:</b>					
<b>Benchmark</b>	<b>Dependency</b>	<b>Status</b>	<b>Start</b>	<b>Finish</b>	
Cycle 3 <ul style="list-style-type: none"> <li>- Define scope</li> <li>- Document requirements</li> <li>- Develop</li> <li>- Test</li> <li>- Deploy</li> </ul>	Internal Staff and Vendor	Not Started	03/15/22	05/14/22	
<b>Comments:</b>					
<b>Benchmark</b>	<b>Dependency</b>	<b>Status</b>	<b>Start</b>	<b>Finish</b>	
Cycle 4 <ul style="list-style-type: none"> <li>- Define scope</li> <li>- Document requirements</li> <li>- Develop</li> <li>- Test</li> <li>- Deploy</li> </ul>	Internal Staff and Vendor	Not Started	05/15/22	07/14/22	
<b>Comments:</b>					
<b>Benchmark</b>	<b>Dependency</b>	<b>Status</b>	<b>Start</b>	<b>Finish</b>	
Cycle 5 <ul style="list-style-type: none"> <li>- Define scope</li> <li>- Document requirements</li> <li>- Develop</li> <li>- Test</li> <li>- Deploy</li> </ul>	Internal Staff and Vendor	Not Started	07/15/22	09/14/22	
<b>Comments:</b>					
<b>Benchmark</b>	<b>Dependency</b>	<b>Status</b>	<b>Start</b>	<b>Finish</b>	
Cycle 6 <ul style="list-style-type: none"> <li>- Define scope</li> <li>- Document requirements</li> <li>- Develop</li> <li>- Test</li> </ul>	Internal Staff and Vendor	Not Started	09/15/22	11/30/22	



- Deploy					
<b>Comments:</b>					
<b>Accounting:</b>	<b>Date Paid</b>	<b>Funds Paid To</b>		<b>Amount Paid</b>	
<b>Total Paid on this Project:</b>					
<b>General Comments:</b>					