

## UW Enterprise IT Projects

### Project Portfolio Executive Summary - 3/1/2018 (update: 5/21/18)

Project	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (To Date)	Budget (Project Life)
[pending] Clinical Transformation	3 - OCIO	0						\$159,500,000
Finance Transformation Readiness	3 - OCIO	13	1	4	4	4	\$1,600,000	\$20,200,000
Pharmacy Inventory Management System	2 - UW	10	2	2	2	4	\$9,658,109	\$14,010,925
Academic Personnel Applicant Tracking System	2 - UW	7	2	2	2	1	\$200,353	\$1,033,000
[pending] Northwest Hospital HR & Labor Integration	2 - UW (?)	0						\$5,000,000
Burke Museum CRM	2 - UW	9	2	3	2	2	\$66,140	\$115,300
[pending] F&A Space	2 - (TBD)	0						TBD
Transportation System Improvement Project	1 - UW	9	2	2	2	3	\$2,888,108	\$3,316,350
Continuum College CRM	1 - UW	13	3	4	4	2	\$700,678	\$1,165,911
Marketo	1 - UW	8	2	2	2	2	\$608,066	\$600,000

### Completed

Project	Oversight Level*	Go Live Date	Project Completion Date	Total Project Cost
HR/Payroll Modernization	3 - OCIO	June 16, 2017	June 30, 2017	\$71,874,422

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<b>[pending]</b>									
<b>Clinical Transformation</b>									
<b>Project</b>	<b>Sponsor</b>	<b>Oversight Level*</b>	<b>Overall Risk *** &amp; Project Health **</b>	<b>Budget Rating</b>	<b>Schedule Rating</b>	<b>Scope Rating</b>	<b>Issues Rating</b>	<b>Actual Cost (To Date)</b>	<b>Budget (Project Life)</b>
<b>[pending] Clinical Transformation</b>	Carlos Pellegrini	3 - OCIO	0						<b>\$159,500,000</b>
<p>Status: This project has not started. It is in a 'discovery phase' so nothing to report. Additional information to be provided, hopefully on June report.</p> <p>UPDATES May 21, 2018, per preliminary Investment Plan:                      - Preliminary budget estimate is \$159.5M, plus \$20.8M in backfill for Medical Center operations.                      - Executive Sponsor: Dr. Carlos Pellegrini                      - PM: TBD</p> <p><i>Per Kerry Kahl 03/27/18</i>  <i>Erik Lundberg 05/21/18</i></p>									

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**Finance Transformation Readiness**

Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (To Date)	Budget (Project Life)
<b>Finance Transformation Readiness</b>	Jeff Scott	3 - OCIO	13	1	4	4	4	\$1,600,000	\$20,200,000

Status:  
**Summary:**  
 Leadership retreat is planned for April 20, 2018.  
 AVP recruitment in process.  
 The program is working on communications regarding the Benchmarking and Data Gathering work.  
 The RFI results were received on March 16th, 2018 and are in review. The RFI results will provide input into the RFP that will be issued to hire the readiness vendor.  
 The program team is updating the organization chart to reflect a holistic UW and UWM implementation and exploring contributed labor options.  
 The program team is recruiting two business analyst positions; job descriptions for Technical Manager and UWFT Administrator are in review.

**Risks/Issues:**  
 Delays on anticipated schedule: If the UWFT program cannot make planned milestones, then the program is at risk to the planned completion of Readiness by 6/2019  
 Readiness/Integrator sourcing: If three key dependencies (AVP hire, Vendor Strategy, Leadership Retreat Outcomes) are not complete, then the RFP cannot be released, impacting timing and onboarding of Readiness Partner.  
 Sponsor availability: If key sponsors and program team leaders are not available to meet as a group, then leadership will not be aligned and key decisions will be delayed resulting in a delay in the overall Readiness timeline. The risk of needing to revisit decisions and/or not making them in the right way is also increased.  
 Leadership Alignment: If leaders are not aligned on key decisions around scope, schedule and budget, emerging issues and other major project priorities, then the program timeline may be negatively impacted  
 Organization/Staffing Plan: If the framework for the UWFT organizational structure and approval to hire of priority positions is not finalized by March 30th, then the recruiting and hiring activities for key positions will be delayed. These positions are critical to help set the workstream strategy, inform detailed activities and staffing plans.  
 Communications: If a broad communication plan is not defined and consistently implemented, then a lack of consistent messaging and stakeholder engagement strategy for UWFT will negatively impact stakeholder buy in and the program team's ability to maintain planned schedule.  
 Major Projects - Impact of NW Hospital Integration and HRPM stabilization on resource availability: If major projects, including HRPM stabilization and NW Hospital Integration, have overlapping timelines or resource requirements with UWFT Readiness, then critical SME resources will not have the capacity to support UWFT program.  
 AVP (UWFT Program Director) not on board for foundational work: The program AVP is not on board for program foundational work, and may not have input into the following readiness activities: vendor strategy, RFP development, guiding principles and leadership retreat. Additionally, if the AVP on-boarding is delayed then the following key activities will proceed without AVP input and/or be delayed: vendor selection, hiring of managers, and guardrail development.

Per Jeanne Marie Isola 04/16/18

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**Pharmacy Inventory Management System**

Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (To Date)	Budget (Project Life)
Pharmacy Inventory Management System	Shabir Somani	2 - UW	10	2	2	2	4	\$9,658,109	\$14,010,925

**Project Status:** Since the January 2018 report, the Pharmacy Inventory Management System (PIMS) Project has executed a re-planning effort in order to accommodate the critical path workstream related to the pharmacy items data collection and build. While conducting the analysis for a revised go-live date, project testing uncovered a new critical issue related to routing and dispensing. The re-forecast schedule and budget has accounted for the new critical issue, and the re-forecast has been approved by the project sponsor.

The major milestones defined in the current baseline:

- Build Complete - June 22, 2018
- Testing Complete - July 27, 2018
- Training Complete - August 31, 2018
- UW Medical Center (Site 1) Go-Live - Early September, 2018
- Software Upgrade - Late October, 2018
- Northwest Hospital (Site 2) Go-Live - December, 2018
- Harborview Medical Center (Site 3) Go-Live - March, 2019
- Seattle Cancer Care Alliance (Site 4) Go-Live - June, 2019
- Project Close-Out - July, 2019

The new baseline budget for the PIMS Project is \$14,010,925. This represents an increase in the project budget of 25% or \$2.7M from the previous \$11,284,644 baseline. The PIMS Project status ratings and Overall Risk & Project Health rating reflect the approved new baseline.

*Per Jake Haunty 4/10/18*

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**Academic Personnel Applicant Tracking System**

Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (To Date)	Budget (Project Life)
<b>Academic Personnel Applicant Tracking System</b>	Cheryl Cameron	2 - UW	7	2	2	2	1	\$200,353	\$1,033,000

Status: The contract, master enterprise agreement, and Investment Plan were all approved in Q1. The enterprise portal has been launched and configuration with Interfolio is underway. Reporting oversight is being led by Marcus Hirsch. The communication plan and change management plan have been drafted and are being implemented. Training dates are being scheduled through the end of 2018.

- The project will focus on the following milestones in the next quarter:
- Configuration completed
  - All users data uploaded to application
  - User acceptance testing completed
  - Current individual (Schools) instances migrated to enterprise portal
  - Administrator training completed
  - Faculty training scheduled

*Per Santiago Cortez 04/04/18*

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[pending] Northwest Hospital HR & Labor Integration									
Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (To Date)	Budget (Project Life)
[pending] Northwest Hospital HR & Labor Integration	Nicki McCraw	2 - UW (?)	0						\$5,000,000
Status: This project has not started. It is in a 'discovery phase' so nothing to report. Additional information to be provided, hopefully on the June report.									
Sponsor: Nicki McCraw PM: Ryan Markowski									
<i>Per Kerry Kahl 03/27/18</i>									

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Burke Museum CRM									
Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (To Date)	Budget (Project Life)
Burke Museum CRM	Julie Stein	2 - UW	9	2	3	2	2	\$66,140	\$115,300
<p><b>Project Status:</b> The Burke went live with PatronManager for it's ticketing, admissions, and membership programs on February 12, shortly followed by camp registrations. Go-Live was very successful, with minimal issues, all of which were resolved quickly. PatronManager completed it's final data migration and will begin it's deduplication process soon. The Burke continues to work with PatronManager on the custom build work for facility rentals, tours, Burke Boxes and Burkemobile.</p>									
<p><i>Per Courtney Davis 4/9/18</i></p>									

Project Portfolio Executive Summary - 3/1/2018 (update: 5/21/18)

**[pending]  
F&A Space**

Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (To Date)	Budget (Project Life)
<b>[pending] F&amp;A Space</b>	Sue Camber	2 - (TBD)	0						TBD

Project Status:  
No updates—under review with OCIO. Will not have enough information by end of March. Additional information to be provided, hopefully on the June report.

*Per Kerry Kahl 03/27/18*

Project Portfolio Executive Summary - 3/1/2018 (update: 5/21/18)

**Transportation System Improvement Project**

Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (To Date)	Budget (Project Life)
Transportation System Improvement Project	John Chapman (was Charles Kennedy)	1 - UW	9	2	2	2	3	\$2,888,108	\$3,316,350

Phase I PARCS installations for Mercer Court, Cedar Hall, Triangle Garage, E1, E12 completed. Phase II T2 parking citations and enforcement configurations into T2 Flex software platform completed. Parking and Revenue Control System (PARCS) including gate arms and pay stations for Central Plaza Garage, N28, and W45 is currently in civil design and with installation tentatively scheduled for this summer. Exploring options for mobile pay and license recognition for implementation 4th quarter 2018.

Per Eric Johnson 04/09/18

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**Continuum College CRM**

Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (To Date)	Budget (Project Life)
Continuum College CRM	Rovy Bannon	1 - UW	13	3	4	4	2	\$700,678	\$1,165,911

Project Status:

- Project includes planned ability to retire Dynamics CRM plus additional ability to retire prior poorly integrated event management and previously deprecated user preference center functionality. Event management has moved to the new system. Completion of retiring Dynamics should be possible within the month. Preference Center functionality was postponed to phase 2.
- Issues beyond schedule slip impacted post-launch system usability and required extended stabilization and issue remediation prior to retirement of Dynamics CRM. Additional effort was managed by the unit project team, with a change order for a small amount of additional consulting time from the vendor. Stabilization and issue resolution continued through beginning of April.
- Ongoing work with the vendor has been terminated due to issues with the initial release including: incomplete functionality at launch, staff turnover, and poor project management practices. Subsequent project phases will be staffed solely with internal resources. Project team will need to reforecast schedule and budget based on revised resourcing plan. Schedule will likely be longer, but need for vendor budget will be substantially reduced.

Per Chris Powell 4/06/18

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Marketo									
Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (To Date)	Budget (Project Life)
Marketo	Advancement - Dan Peterson	1 - UW	8	2	2	2	2	\$608,066	\$600,000
<p>Project Status:</p> <p>Marketo is a "powerful marketing automation software that helps marketers master the art &amp; science of digital marketing to engage customers and prospects" (<a href="http://www.marketo.com">www.marketo.com</a>)</p> <p>Marketo kicked off on 3/15/17, with a core project team made up of 17 members who met weekly to discuss risks/issues, status and committee specific topics. Committees were organized to conduct pilot projects through the lifecycle of the project and research different Marketo functionality to understand the best way to implement across campus. The UW team also met with a group of Marketo consultants who evaluated the business need and provided recommendations and training. The project was originally slated to go-live in July because it was dependent on the Convio contract which got extended by 3 months, ultimately pushing our go-live date to 9/20/17.</p> <p>Marketo went live on 9/20/17, conducting 90 training classes and training 407 users across the University to operate Marketo to batch and blast emails. To date, 24.2 million emails have been sent.</p> <p>Since go-live, the project has moved to a central service model, where Central is providing support in audience list loading, program review, etc. Central is using Slack as a tool for quick communications and Freshdesk as our ticketing system to track request from across the university.</p> <p>Along the way, we built 3 Master email templates &amp; worked with Marketo to build an additional 5 email templates. We created custom objects that allows us to store additional information about people in the Marketo database, allowing us to use this to trigger custom communication and marketing activities. We also created our own Newsletter Subscription Preference Center.</p> <p>Additional Marketo functionality &amp; training for it has been planned to be released quarterly to allow us to continue to learn, build, pilot/test, and train our users.</p> <p>There are currently no high risks/issues and this project can now be closed.</p>									
<p><i>Per Michael Visaya 04/10/18</i></p>									

Completed Projects Summary - 3/1/2018 (update: 5/21/18)

Project	Sponsor	Oversight Level*	Go Live Date	Project Completion Date	Total Project Cost
<b>HR/Payroll Modernization</b>	Mindy Kornberg Cheryl Cameron Ruth Mahan Aaron Powell Dave Anderson	3 - OCIO	June 16, 2017	June 30, 2017	\$71,874,422

* Oversight Level Key	** Project Health Key
<p>1. Overseen by UW management and staff. Requires OCIO approval and reporting if over delegated authority.</p>	<p style="text-align: center;"><b>Green</b></p> <p>Project is on time, on budget, and within defined scope. <b>Overall Risk Rating where 4-9 is Green</b></p>
<p>2. OCIO approval required and regular project reporting. Quality Assurance (QA) reporting required, maybe internal or external. OCIO may recommend project to be full Technology Services Board (TSB) oversight.</p>	<p style="text-align: center;"><b>Yellow</b></p> <p>Changes to scope, budget, or resources have placed project at some risk. Project has the potential for delays or scope changes. <b>Overall Risk Rating where 10-14 is Yellow</b></p>
<p>3. High severity and/or high risk, subject to full TSB oversight, which includes TSB approval, written reports to the TSB, periodic status reports to the TSB by the agency director and staff, and submission of other reports as directed by the TSB. External QA reporting required.</p>	<p style="text-align: center;"><b>Red</b></p> <p>Major changes to scope, budget or resources have placed project at critical risk. One or more of the following must change in order to proceed: project schedule, resources, budget, scope. <b>Overall Risk Rating where 15-20 is Red</b></p>

**Note for UW Medicine: project oversight levels 2 & 3 report to UW management**

*** IT Project Risk Ratings	
<b>Current Risk Rating</b>	Use the scale below to rate current performance on Budget, Schedule and Scope (select appropriate number for each)
Budget Schedule Scope	<ul style="list-style-type: none"> <li>1 = Performing better than project plan; ahead by 5% or more</li> <li>2 = Performance is on plan</li> <li>3 = Behind plan, but within 5% of original targets</li> <li>4 = Behind plan between 6% to 10% and likely to use/using contingency</li> <li>5 = Greater than 10% behind plan and more than half of contingency used</li> </ul>
<b>Current Risk Rating</b>	Use the scale below to rate current impact of Issues and other factors relevant to the project (select one number for this measure)
Issues	<ul style="list-style-type: none"> <li>1 = No risks or issues identified at this time</li> <li>2 = Some identified but minor, no impacts anticipated</li> <li>3 = Some that could impact the project are being managed, with minimal impact anticipated</li> <li>4 = Significant risks/issues/other factors identified but not yet managed</li> <li>5 = Risks/issues being managed but will have significant impact (greater than 10%) on project budget, schedule and/or scope</li> </ul>