

# Project Portfolio Executive Summary for February 2016

## UW Enterprise Projects

Projects - Red	Sponsor	Oversight Level *	Project Health **	Overall Risk Rating ***	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (Project Life)	Budget (Project Life)
<b>HR/Payroll Modernization</b>	Kelli Trosvig Mindy Kornberg Cheryl Cameron Ruth Mahan Paul Jenny Dave Anderson	3 - OCIO	<b>Red</b>	16	2	5	4	5	\$35,462,463	\$67,464,473

**Project Status:** In fall 2015, the HRPM leadership identified a significant number of outstanding issues among projects in the program. At the end of December, the program was paused to do an evaluation of outstanding work, timelines and options to go forward. Evaluation of the following issues led to postponement of planned program activities and to new planning to address program gaps:

- The results of end-to-end testing were such that we could not begin UAT in January.
  - UWHIRES was not ready in time for testing
  - Integrated testing across functions was not successful
- Plans for the operating model were determined to be non-sufficient for successful support after go-live.
- The program schedule provided insufficient time for parallel payroll testing
- Data conversion is taking far too long and needs to be streamlined and efficiently run in mock settings.
- Change requests imply that decisions around configuration were not appropriately vetted and as a result, elements of the program as currently configured will not serve the needs of the University.

**Next Steps:**

To address program gaps, HRPM leadership added a new phase called, Building a Cohesive Design (BaCD). The phase involves a comprehensive, bottom-up review of the design to ensure that we are building a system that will meet the needs of the University.

In early February, a small group of the HRPM team began working on a four-week effort focused on launching this phase and setting the stage for subsequent design activities. Their deliverable is an articulation of the future state design for HRPM. To create it, the team will perform a systematic examination of numerous inputs, including the BPR work by campus, current configuration design, input for the Integrated Service Center (ISC) and leading practices. Their work will be used to help campus effectively validate the design. The first output will be Foundations sessions, which will communicate Workday concepts and how they are applied at UW, and the guardrails for enterprise strategies that ensure HRPM is designed to serve campus. Once campus shares an understanding of the concepts and strategies, we will engage subject matter experts in an evaluation of the future state design during DIVE sessions so that we can validate the design details.

While the small team concentrates on the future state design, the majority of the Program are focusing on a number of key priorities including:

- Payroll parallel pilot test
- P3 Data Validation and associated data clean-up efforts
- Data Conversion, Cleanup, Collection, and Validation Strategy/Approach
- Continuing to refine our training and LMS strategies with our key partners
- Building our curriculum for the Foundations and DIVE sessions
- Continue re planning activities, including developing a 100k ft. view of our new program plan, a new project dashboard, and related program communications
- Enterprise Strategy Work
- Pre-DIVE Test Defect Resolution
- UWHires testing with P3 data
- Benefit reconfiguration work and HCA strategy work
- Support HRPI downstream testing

## Project Portfolio Executive Summary for February 2016

We are confident that we will emerge from this “prep” with a strong first draft design and a clear path towards successful deployment.

**Foundations:** During Foundations, we will establish a shared context for evaluating the future state design. Foundations sessions will build a common understanding of Workday concepts and how Workday will work at UW, and will communicate the strategic guardrails within which the design must function. Foundations will enable program members, subject matter experts and campus representatives to consider configuration decisions, options, and guardrails from a common perspective.

**Design Integrity Validation (DIVE):** The DIVE sessions will validate the future state design details. These sessions bring together members of the program and Subject Matter Experts (SMEs) to examine the design and resolve outstanding issues by validating the process flow design against a comprehensive set of lenses for Reporting, Data, Integrations, Security, Records, User Experience (UX) and Job Aids.

**Business Owner and Key Partner Validation:** DIVE concludes with the validation of our future state design by business owners and key partners. These sessions will show the results of the DIVE sessions, into which they will have sent their subject matter experts. Business Owners will work through specific user case scenarios to validate the design will meet their needs.

**Campus Engagement:** Once Business Owners and Key Partners validate the design, we will engage the entire University by resuming Step Two of the Seven Steps of Campus Engagement. Step Two involves engaging University readiness teams and subject matter experts in analyzing the future state design to identify their specific change impacts.

The output of this Building a Cohesive Design will inform a proposal for the program timeline, resources and budget that can be presented to the Board of Regents this spring.

Projects - Yellow	Sponsor	Oversight Level *	Project Health **	Overall Risk Rating ***	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (Project Life)	Budget (Project Life)
<b>Transportation System Improvement Project</b>	Charles Kennedy	1 - UW	Yellow	10	2	3	2	3	\$1,128,467	\$1,440,200

**Project Status:** Schedule: The completion for the schedule of Phase 1a has slipped by 45 days. It was scheduled to complete by December 21, 2015. Due to weather and civil work issues, the vendor is scheduled to complete the work and all planned facilities will be complete by mid-February. Completion of Phase 1b is still scheduled for completion by the end of spring.

**Risks:** The lead Sr. Computer Specialist for this project has resigned. The TS Business Systems Project Manager and Systems Configuration Specialist will continue requirement and configuration scoping for Phase 1b with the vendor as we recruit to fill the vacant position.

# Project Portfolio Executive Summary for February 2016

## UW Medicine Projects

Projects - Yellow	Sponsor	Oversight Level *	Project Health **	Overall Risk Rating ***	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (Project Life)	Budget (Project Life)
Pharmacy Inventory Management System	Shabir Somani	2 - UW	Yellow	14	1	4	4	5	\$1,541,945	\$6,941,089

**Project Status:** The Pharmacy Inventory Management System (PIMS) project continues to be in the Planning and Analysis phase. UW Medicine and TECSYS (system vendor) are working towards confirming and finalizing project scope, timeline, and resources.

Current major activities include:

- Revise investment plan (to be approved by VP UW-IT/CIO).
- Complete Chart of Accounts and General Ledger updates (for UWMC, HMC, & NWH) for Elite 9.2 Proof of Concept Build.
- Continue build for Elite 9.2 Proof of Concept (Items, Vendors, Customer, and Location).
- Make decision on whether to keep current state pharmacy vendor payment process and delay Elite pharmacy vendor payment processing functionality; decision to be made by UW Medicine Pharmacy and Accounting leadership.
- Develop conceptual project timeline based on pharmacy vendor payment functionality decision and TECSYS software functionality delivery schedule.
- Develop resource plan to support both Product Development and Implementation work threads, as well as to meet aggressive implementation (go-live) schedule.
- Revise project plan (WBS) to reflect full work effort for conceptual project timeline.
- Complete a trip to Montreal, Canada (week of Feb 15, 2016) so UW personnel can validate carousel functionality with TECSYS R&D team.
- Continue UW Medicine participation in deep dive and review sessions with TECSYS.
- Continue interface mapping efforts between TECSYS Elite system and EHRs, Pyxis, and Pharmacy Vendors.
- Continue work on technical infrastructure.
- Review first set of issues, risks, and recommendations from external QA reviewers and begin implementing change.

Upcoming major milestones include:

- Elite 9.2 Proof of Concept Build Complete
- Carousel Functionality Validation

Major Risks/Issues:

- Issue - Development and Implementation Project: In March 2015, the PIMS project evolved into a "Development Project" with a heavy dependency on TECSYS creating and UW Medicine providing input into net new pharmacy software functionality.
- Issue - Vendor product functionality: Given that a comprehensive pharmacy supply chain application for health care does not currently exist in the marketplace today, the product development effort requires UW Medicine and TECSYS to decide what functionality is inside and outside of scope for the upcoming TECSYS releases. Agreement on the product functionality has been slow to date and has slowed the overall timeline. Until this is defined, it will be difficult to complete the project plan schedule, and planning deliverables.
- Issue - Project Management: the current project manager's statement of work is expiring and UW will be hiring a new project manager. This will require additional overhead for the selection process and transition of knowledge, thereby potentially slowing progress toward finalizing the plan.
- Risk - Budget and UW Medicine Resource availability: UW Medicine is submitting budget requests for FY17. Availability of funding if below the requested amounts could adversely impact ability to secure UW Medicine resources (Operational, IT Services, and External) and thereby impact schedule.
- Risk - TECSYS Resource availability: If TECSYS development or implementation resources are not available, it could have schedule impacts.

## Project Portfolio Executive Summary for February 2016

Projects – Complete	Sponsor	Oversight Level *	Monitor of Benefits/Value Realized
<b>Epic Enterprise Specialty Implementation:</b> Project went live 5/20/14	Johnese Spisso James Fine	1 - UW	

* Oversight Level Key	
1	Overseen by UW management and staff. Requires OCIO approval and reporting if over delegated authority.
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.
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.

** Project Health Key	
<b>Green</b>	Project is on time, on budget, and within defined scope. <b>Overall Risk Rating where 4-9 is Green.</b>
<b>Yellow</b>	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>
<b>Red</b>	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>

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

*** IT Project Risk Ratings	
Current Risk Rating	Use the scale below to rate current performance on <b>Budget, Schedule</b> and <b>Scope</b> (select appropriate number for each)
Budget =	1 = Performing better than project plan; ahead by 5% or more 2 = Performance is on plan
Schedule =	3 = Behind plan, but within 5% of original targets 4 = Behind plan between 6% to 10% and likely to use/using contingency
Scope =	5 = Greater than 10% behind plan and more than half of contingency used
Current Risk Rating	Use the scale below to rate current impact of <b>Issues</b> and other factors relevant to the project (select one number for this measure)
Issues =	1 = No risks or issues identified at this time 2 = Some identified but minor, no impacts anticipated 3 = Some that could impact the project are being managed, with minimal impact anticipated 4 = Significant risks/issues/other factors identified but not yet managed 5 = Risks/issues being managed but will have significant impact (greater than 10%) on project budget, schedule and/or scope