

UW Major Project Portfolio Executive Summary - Dec 2017

Project	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Acutal Cost (To Date)	Budget (Project Life)
Pharmacy Inventory Management System	2 - UW	16	5	5	2	4	\$7,648,276	\$11,284,644
Burke Museum CRM	2 - UW	9	2	3	2	2	\$15,000	\$115,300
Transportation System Improvement Project	1 - UW	9	2	2	2	3	\$2,364,459	\$3,316,350
Continuum College CRM	1 - UW	9	3	3	1	2	\$389,718	\$1,165,911
Marketo	1 - UW	9	2	2	2	3	\$567,478	\$600,000

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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	16	5	5	2	4	\$7,648,276	\$11,284,644

Project Status: The Pharmacy Inventory Management System (PIMS) Project conducted a major project budget and schedule re-baseline in Q1 of 2017. This re-baseline of schedule and budget was reported to the UW Risk Council in February, 2017. The re-baseline accounted for the major vendor software development required to meet the requirements of UW Medicine. The re-baselined plan included the requisite vendor software development cycles as well as the inclusion of a Proof of Concept (PoC) of the software solution. The PoC was intended to validate the solution to UW Medicine leadership and to UW Medicine Pharmacy operations. The re-baseline increased the project budget from \$6.9M to \$11.3M. The current baseline schedule calls for the initial implementation of the solution at UW Medical Center in February, 2018. Following stabilization, the schedule calls for a subsequent major software version upgrade followed by deployments at Pharmacy locations at Northwest Hospital, Harborview Medical Center, and the Seattle Cancer Care Alliance through June, 2018.

Major milestones identified in the re-baseline (with current status) include:

- Design Complete - 4/7/17 (Complete)
- Proof of Concept Complete - 5/31/17 (Complete)
- UWMC Facilities Work Complete - 8/1/17 (Complete)
- UWMC Carousels Installation Complete - 9/30/17 (Complete)
- UW Medicine Pharmacy Items Build Complete - 10/1/17 (TBD. See below.)
- Testing Complete - 11/28/17 (TBD. See below.)
- UW Medical Center Go-Live - 2/4/18 (TBD. See below.)

As of 1/19/18, the PIMS Project has continued to make significant progress towards the Phase 1 go-live at UW Medical Center, however delays in software delivery by the vendor during Q4 of CY2017 forced the project leadership team to acknowledge the inability to meet the planned go-live date in February, 2018. The project management team has been focused on recasting the project schedule for both the Phase 1 go-live at UW Medical Center and the subsequent Phase 2 rollout across other UW Medicine entities. A draft schedule has not yet been approved by project executive leadership because it has not yet mitigated the schedule risk posed by the pharmacy item build work stream. The item table is the core reference data for the application, and the data exists in multiple systems/files and across multiple subject matter experts in the current state. The project management team is currently executing a plan to mitigate the schedule risk of the item build. The remaining project schedule will be recast by mid-February. The order of magnitude of schedule delay appears to be 12-15 weeks for the initial UWMC go-live. The subsequent deployments at the remaining sites are projected to occur over the following 12-14 months.

Note the budget, schedule, and scope ratings are based on the most recent re-baseline in February, 2017. The high ratings for budget and schedule are a combination of the delayed go-live at UWMC as well as an increase in the effort and duration to deploy the solution to the subsequent entities (Northwest Hospital, Seattle Cancer Care Alliance, and Harborview Medical Center).

Per Jake Haunty 1/19/18

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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	\$15,000	\$115,300

Project Status: This project is on track to Go-Live on February 12. As the project has progressed, it's become evident that PatronManager, a system built for performing arts requires some additional customization to work properly in the museum environment. Additionally, to achieve the best possible customer experience, the Burke will need to build some API integration into its existing website. Because of this, the rollout of different pieces of functionality within PatronManager has been staggered. This is the reason that the schedule rating was decreased. However, the Burke, UW-IT Oversight, and PatronManager are comfortable with the minor changes made to the timeline.

Per Courtney Davis 1/18/18

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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	\$2,364,459	\$3,316,350

Project Status:

- Completed implementation of Citations module,
- Completed implementation of Enforcement module,
- Increased pay station installations to further decrease transactions at gatehouses,
- Continued migration planning of Wheels application to T2 Flex application,
- Begin Wheels application data archive planning.

- (December update) Team is reviewing Statement of Work proposal from vendor (T2)
- NOTE: Charles Kennedy has retired. Interim AVP is John Chapman.

Per Chuck Benson 1/22/18

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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	9	3	3	1	2	\$389,718	\$1,165,911

Project Status:

- Phase 1 release delayed 2 weeks to Nov 13th due to larger than expected scope but will remain within 2% of budget
- 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.
- Issues beyond schedule slip are impacting post-launch system usability and are requiring extended stabilization and issue remediation prior to retirement of Dynamics CRM. Additional effort is being 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 is expected to continue through beginning of March.
- Higher than forecast 1st year software licensing costs driving up forecast system 5-year TCO based on original forecast growth rate. However actual growth rate may be significantly reduced based on licensing assumptions:
 - to be confirmed when licenses are renewed at beginning of 2nd year.

Per Chris Powell 1/18/18

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Marketo									
Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Acutal Cost (To Date)	Budget (Project Life)
Marketo	Advancement - Dan Peterson	1 - UW	9	2	2	2	3	\$567,478	\$600,000
<p>Project Status: Marketo kicked off on 3/15, 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.</p> <p>During Phase 1:</p> <ol style="list-style-type: none"> 1. We built 3 Master email templates & worked with Marketo to build an additional 5 email templates. 2. 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. 3. We created our own Subscription Preference Center. <p>Marketo went live on 9/20, enabling close to 300 users the ability to batch and blast emails. Users across the University were provided training and assigned a user role with specific permission for their operation in Marketo.</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. Additional functionality has been planned to be released in phases to allow us to continue to learn, build, pilot/test, and train our users.</p>									
Per Michael Visaya 1/22/18									

* 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	
Green	Project is on time, on budget, and within defined scope. Overall Risk Rating where 4-9 is Green. Overall Risk Rating where 4-9 is Green
Yellow	Changes to scope, budget, or resources have placed project at some risk. Project has the potential for delays or scope changes. Overall Risk Rating where 10-14 is Yellow.
Red	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. Overall Risk Rating where 15-20 is Red.

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 Budget, Schedule and Scope (select appropriate number for each)
Budget Schedule Scope	1 = Performing better than project plan; ahead by 5% or more 2 = Performance is on plan 3 = Behind plan, but within 5% of original targets 4 = Behind plan between 6% to 10% and likely to use/using contingency 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 Issues 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