

Project Portfolio Executive Summary - Sep 2017

Project	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (To Date)	Budget (Project Life)
HR/Payroll Modernization	3 - OCIO	8	1	2	2	3	\$70,444,072	\$75,284,909
Pharmacy Inventory Management System	2 - UW	16	5	5	2	4	\$7,648,276	\$11,284,644
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	\$580,122	\$600,000
Burke Museum CRM	2 - UW	7	2	2	2	1	\$15,000	\$115,300

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HR/Payroll Modernization

Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Acutal Cost (To Date)	Budget (Project Life)
HR/Payroll Modernization	Mindy Kornberg Cheryl Cameron Ruth Mahan Aaron Powell Dave Anderson	3 - OCIO	8	1	2	2	3	\$70,444,072	\$75,284,909

Project Status:
 HR/P Modernization program went live successfully on 6/26/2017, and has since been paying its employees through the summer and start of the fall quarter. The Integrated Service Center (ISC) along with other Central Business Units (CBUs) including HR and IT are continuing to stabilize the people, processes, and technology implemented at UW, while at the same time navigating or preparing for the first time events in Workday such as the start of the Fall Quarter, 2017 Merit, Benefits Open Enrollment, Calendar Year End, etc. The project is being closed out and all future stabilization and optimization activities are being performed as part of operations.

Note: This is the final quarterly oversight report for HR/P Modernization.

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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 (Likely mid-December completion)
- Testing Complete - 11/28/17 (TBD. Dependent on software delivery schedule)
- UW Medical Center Go-Live - 2/4/18 (TBD. See below.)

As of 10/31/17, the PIMS Project has continued to make significant progress towards the first go-live, however it is tracking behind schedule on many of the critical path major milestones by 4 to 10 weeks. The project schedule can absorb some of the milestones schedule slips (e.g., facilities work, carousels installation, and items build) by modified resource planning or re-scheduling sets of tasks. However, the final delivery of vendor software components has delayed solution testing critical path. The project leadership team has acknowledged the inability to make the February, 2018 go-live date at UW Medical Center.

The software vendor, TECSYS, has 3 discrete outstanding software packages required prior to the complete system testing cycle. The delivery dates are on the project's critical path and have not yet been determined by the vendor; however TECSYS is working internally to establish the delivery schedule. Once the delivery schedule is known, the project schedule will be recast to determine a projected revised go-live at the first site, UWMC.

UW Medicine leadership is working closely with TECSYS senior management to elicit commitments on the software delivery schedule. Once delivery schedule is confirmed, the PIMS project management team will re-cast the remaining project schedule. Based on early indication, the PIMS project management team believes the order of magnitude delay for the UWMC go-live is 8 to 12 weeks.

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 likely 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).

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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	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.

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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 relatively minor and being managed by the project team
- 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.

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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	9	2	2	2	3	\$580,122	\$600,000
<p>Project Status:</p> <p>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>									

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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	7	2	2	2	1	\$15,000	\$115,300

Project Status: This project is in its early stages, and so far, everything is on track. The PatronManager team kicked off the project internally with a site visit, several discovery meetings. Together with the Burke, they created implementation and data migration plans for the project. PatronManager is in the process of creating a detailed, digital GANT chart project plan with all the tasks required to meet the deadlines outlined in the project plan.

Per Courtney Davis 10/23/17 cedavis2@uw.edu

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

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

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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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