AGENDA

> Call to Order
  – Welcome and introductions
> EVP transition update
> Major Projects update
  – Clinical Transformation
  – NWH/UWP HR & labor integration
  – UW Finance Transformation
  – Priorities and sequencing
> IT Governance evaluation update
  – Action plan update
  – Critical IT issues – summary and recommendations
> IT Project Portfolio Executive Review
> Wrap up
  – Microsoft site licensing (February agenda)
EVP Transition Update

Aaron Powell
Vice President, UW-IT and Chief Information Officer
Major Projects Update

Aaron Powell
Vice President, UW-IT and Chief Information Officer
Clinical Transformation

Joy Grosser
Chief Information Officer, UW Medicine
Key Accomplishments

• Received Board of Regents’ approval
  • July 12, 2018
• Signed contract with Epic
• Hired Program Directors (External Consultants with Experience in this space)
  • Matt Lambert, MD
  • Ana Blanco
• Engaged external Quality Assurance and Communications Contractors
  • Slalom Consulting
Key Accomplishments (cont.)

• ITS project team staff; started training
• Epic project team staffed
• Moved into project office at SLU
  • Program space through June 1, 2019
• Program kick-off
  • October 2, 2018
  • Formal presentations by Paul Ramsey, MD; Lisa Brandenburg; Jacque Cabe; Carlos Pellegrini, MD; Tim Dellit, MD; Theresa Braungardt, MN; Jamie Park, MD; Matt Lambert, MD
  • Product Demonstrations by Epic – 6 rooms to demonstrate all products for this project
# Clinical Transformation

## Change Management

### Groundwork (Discovery)
- Project Planning
- Define program oversight
- Staffing and training
- Key organizational scoping
- Complete committee membership
- Start committee meetings
- Groundwork (Discovery) prep

### Phase 0
- Finalize project plan
- Identify key performance indicators
- Program team completes certification
- Direction (Design) sessions
- Finalize application scope

### Phase 1
- Delivery of Foundation System
- System build
- Adoption (Build) Sessions
- Complete build for testing

### Phase 2
- Integrated (system) testing
- Complete remaining content build
- Training lesson plans

### Phase 3
- User training
- Device deployment
- Go-live readiness assessments and dress rehearsal
- Go-live

### Phase 4
- Post-live support
- Post-live visits
- Ongoing training
- Long-term support
- Upgrades

### Post-Live & Stabilization
- Proposed Go-Live 4/2020

### Timeline
- **10/2018 – 11/2018**
- **12/2018 – 1/2019**
- **1/2019 – 7/2019**
- **7/2019 – 1/2020**
- **1/2020 – 4/2020**
- **4/2020 – 11/2020**
Groundwork (Discovery)

Project Planning
- Define Program Oversight
- Staffing & training
- Complete committee membership
- Start committee meetings
- Groundwork (Discovery) prep

Direction (Design)
- Finalize project plan
- Identify key performance indicators
- Program team completes committee certification
- Direction (Design) sessions
- Finalize application scope

Adoption (Build)
- Delivery of Foundation System build
- Adoption (Build) sessions
- Complete build for testing

Testing

Training & Go-Live
- Integrated (system) testing
- Complete remaining content build
- Training lesson plans

Post-Live & Stabilization
- User training
- Device deployment
- Go-live readiness assessments and dress rehearsal
- Go-live

Proposed Go-Live 4/2020

Clinical Transformation Change Management
<table>
<thead>
<tr>
<th>Phase 0</th>
<th>Phase 1</th>
<th>Phase 2</th>
<th>Phase 3</th>
<th>Phase 4</th>
<th>Phase 5</th>
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<tbody>
<tr>
<td>Project Planning</td>
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<td>Delivery of Foundation System</td>
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<td>Define program oversight</td>
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<td>Complete committee membership</td>
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<td>Start committee meetings</td>
<td>Make decisions</td>
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<tr>
<td>Groundwork (Discovery) prep</td>
<td>Engage leaders</td>
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<tr>
<td>Direction (Design)</td>
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<td>Post-Live &amp; Stabilization</td>
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</table>

Clinical Transformation Change Management
Direction (Design) Sessions

- Weeks of December 3 and December 10
- On-site sessions with key decision makers to define your organization’s workflows and operational goals
- Sets the stage for the workflow adoption and build cycles
Clinical Transformation Change Management

**Adoption (Build)**
- Engage stakeholders
- Adoption (build) sessions
- Workflow signoff
- Complete build for testing

**Groundwork (Discovery)**
- Project Planning
- Define program oversight
- Staffing and training
- Key organizational scoping
- Complete committee membership
- Start committee meetings
- Groundwork (Discovery) prep

**Direction (Design)**
- Finalize project plan
- Identify key performance indicators
- Program team completes certification
- Direction (Design) sessions
- Finalize application scope

**Adoption (Build)**
- Delivery of Foundation System
- System build
- Adoption (Build) Sessions
- Complete build for testing

**Testing**
- Integrated (system) testing
- Complete remaining content build
- Training lesson plans

**Training & Go-Live**
- User training
- System testing
- Go-live readiness assessments and dress rehearsal
- Go-live

**Post-Live & Stabilization**
- Post live support
- Post-live visits
- Ongoing training
- Long-term support
- Upgrades

**Proposed Go-Live 4/2020**

10/2018 – 11/2018

12/2018 – 1/2019

1/2019 – 7/2019

7/2019 – 1/2020

1/2020 – 4/2020

4/2020 – 11/2020
Clinical Transformation Change Management

**Groundwork (Discovery)**
- Project Planning
- Define program oversight
- Staffing and training
- Key organizational scoping
- Complete committee membership
- Start committee meetings
- Groundwork (Discovery) prep

**Direction (Design)**
- Finalize project plan
- Identify key performance indicators
- Program team completes certification
- Direction (Design) sessions
- Finalize application scope

**Adoption (Build)**
- Delivery of Foundation System
- System build
- Adoption (Build) Sessions
- Complete build for testing

**Testing**
- Testing prep
- Complete application, integrated, parallel revenue, interfaces, and charge testing

**Phase 0**
- 12/2018 – 1/2019
- Project Planning
- Define program oversight
- Staffing and training
- Key organizational scoping
- Complete committee membership
- Start committee meetings
- Groundwork (Discovery) prep

**Phase 1**
- 1/2019 – 7/2019
- Finalize project plan
- Identify key performance indicators
- Program team completes certification
- Direction (Design) sessions
- Finalize application scope

**Phase 2**
- 7/2019 – 1/2020
- Delivery of Foundation System
- System build
- Adoption (Build) Sessions
- Complete build for testing

**Phase 3**
- 1/2020 – 4/2020
- Integrated (system) testing
- Complete remaining content build
- Training lesson plans

**Phase 4**
- 4/2020 – 11/2020
- User training
- Device deployment
- Go-live readiness assessments and dress rehearsal
- Go-live

**Phase 5**
- 4/2020 – 11/2020
- Post-live support
- Post-live visits
- Ongoing training
- Long-term support
- Upgrades
Training & Go-Live

- Transform training methodology and approach
- User training
- Go-Live readiness activities
- Cutover and conversions

Phase 0
- Project planning
- Define program oversight
- Staffing and training
- Key organizational scoping
- Complete committee membership
- Start committee meetings
- Groundwork (Discovery) prep

Phase 1
- Finalize project plan
- Identify key performance indicators
- Program team completes certification
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- Finalize application scope

Phase 2
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- Go-live

Phase 5
- Post-live support
- Post-live visits
- Ongoing training
- Long-term support
- Upgrades

Clinical Transformation Change Management

Proposed Go-Live
4/2020

- 10/2018 – 11/2018
- 12/2018 – 1/2019
- 7/2019 – 1/2020
- 1/2020 – 4/2020
- 4/2020 – 11/2020
### Clinical Transformation Change Management

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<thead>
<tr>
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<tbody>
<tr>
<td>Phase 1</td>
<td>Project Planning</td>
<td>Finalize project plan</td>
<td>Delivery of Foundation System</td>
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<tr>
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<td>Define program oversight</td>
<td>Project team completes certification</td>
<td>System build (Adoption, Build) Sessions</td>
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<tr>
<td></td>
<td>Staffing and training</td>
<td>Direction (Design) sessions</td>
<td>Complete build for testing</td>
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<td></td>
<td>Start committee meetings</td>
<td>Groundwork (Discovery) prep</td>
<td>Training lesson plans</td>
</tr>
</tbody>
</table>

- **Phase 2**
  - Epic post-live visits
  - Continued transformation opportunities
  - Perform efficiency training
  - Document metrics

- **Phase 3**
  - User training
  - Device deployment
  - Go-live readiness assessments and dress rehearsal
  - Go-live

- **Phase 4**
  - Post-live support
  - Post-live visits
  - Ongoing training
  - Long-term support
  - Upgrades

---

**Proposed Go-Live**

- 4/2020

---
Clinical Transformation Program
Monthly Status Report – October 2018

SCHEDULE

<table>
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<tr>
<th>Milestone</th>
<th>Original</th>
<th>Current Baseline</th>
<th>Health</th>
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<tbody>
<tr>
<td>Phase 0 – Groundwork (Discovery)</td>
<td>Mon 9/3/18</td>
<td>Fri 11/30/18</td>
<td>Green</td>
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<tr>
<td>Phase 1 – Direction (Design)</td>
<td>Mon 12/3/18</td>
<td>Fri 1/18/19</td>
<td>Not Started</td>
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<tr>
<td>Phase 2 – Adoption (Build)</td>
<td>Mon 1/21/19</td>
<td>Fri 7/19/19</td>
<td>Not Started</td>
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<tr>
<td>Phase 3 - Testing</td>
<td>Mon 7/22/19</td>
<td>Fri 1/3/20</td>
<td>Not Started</td>
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<tr>
<td>Phase 4 – Training and Go-Live</td>
<td>Mon 1/6/20</td>
<td>Fri 4/3/20</td>
<td>Not Started</td>
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<tr>
<td>Go-Live (Proposed)</td>
<td>Sun 4/5/20</td>
<td>Fri 4/24/20</td>
<td>Not Started</td>
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<tr>
<td>Phase 5 - Post-Live Support and Stabilization</td>
<td>Mon 4/27/20</td>
<td>Fri 11/6/20</td>
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</table>

PROJECT HEALTH

<table>
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<tr>
<th>Category</th>
<th>Health</th>
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<tr>
<td>Schedule</td>
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<tr>
<td>Budget</td>
<td>G</td>
</tr>
<tr>
<td>Scope / Risk</td>
<td>G</td>
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</tbody>
</table>

Notes
- LOE - Current Plan is equal to the actual and planned hours that have been baselined in Project Server
- Actual Work to Date is hours entered into Project Server through 10/12/2018
- % Work Complete is Actual Work to Date divided by the Current Plan
- % Work Complete is 1.2%
- Proposed Go-Live Date is April 2020

PROJECT INFORMATION

Program Directors
Ana Blanco
Matt Lambert

Current Project Phase
Groundwork/Project Scope

LOE – Current Plan
642,590.47

Actual Work To Date
7,963.03

% Work Complete
1.2%

Proposed Go-Live Date
April 2020

KEY ACTIVITIES – THIS MONTH

Accomplished
- Engaged interim clinical transformation change management partner
- Defined program oversight structure
- Completed project planning activities
- Started Groundwork (Discovery) prep
- Scheduled recurring Executive Steering Committee meetings
- Completed committee membership
- Initiated CT Committee meetings

KEY ACTIVITIES – NEXT MONTH

Planned
- Select long term clinical transformation change management partner
- Schedule recurring Operations and CT Committee meetings
- Start CT Program communications
- Select Program name and branding
- Review and seek approval
  - Guiding Principles
  - Project Charter
- Send Direction (Design) Session invites
  - December 4, 5, and 6
  - December 11, 12, and 13
- Complete Direction (Design) Session logistics
- ITS team completes Epic training
## KEY RISKS & ISSUES

![Legend]

**Legend**
- Bubble size indicates operational impact
- Project impact relates to project budget or schedule
- Bubble color indicates risk severity (a combination of project & operational impact and likelihood)

### Project Description/Update

<table>
<thead>
<tr>
<th>#</th>
<th>Risk</th>
<th>Mitigation Plan</th>
</tr>
</thead>
</table>
| CT-10 | Project Oversight Committee Formation | • Committee formation underway  
       | | • Interim Org Change Management team developing a plan to facilitate rapid engagement  
       | | • Initiate committee meetings by 10/29/18  
       | |   |
| CT-17 | Communication - Little communication has been delivered to the physicians, clinicians, staff and administrators. | • Communications strategy work is underway  
       | | • Program name and branding options being presented to executive steering  
       | |   |
| CT-13 | High level scoping incomplete | • Project Oversight committees will make scoping decisions  
       | | • Committee formation underway  
       | | • Interim Org Change Management team developing a plan to facilitate rapid engagement  
       | | • Initiate committee meetings by 10/29/18  
       | |   |
| CT-7 | Competing Initiatives | With appropriate CT program oversight in place, CT program leadership continually reinforces with UW Medicine senior VPs the critical nature of the investment and benefit and of the resulting impact of a diluted focus.  
       | |   |

## BUDGET (through September 30, 2018)

<table>
<thead>
<tr>
<th>Total Project</th>
<th>Budget</th>
<th>Current Forecast</th>
<th>Actuals **</th>
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<tr>
<td>Capital</td>
<td>82,958,296</td>
<td>82,958,296</td>
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<tr>
<td>Operating</td>
<td>76,512,744</td>
<td>76,512,744</td>
<td>634,242</td>
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<tr>
<td>Total</td>
<td>159,471,039</td>
<td>159,471,039</td>
<td>634,242</td>
</tr>
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</table>

* Current forecast matches budget for now while discreet costs (labor and non-labor) are being firmed up  
** Preliminary actuals charged to the project through September 30, 2018

### Risk Impact

- **High (H)**
- **Low (L)**
- **Moderate (M)**
- **Green (G)**
- **Red (R)**
- **Orange (O)**
- **Yellow (Y)**
- **Gray (G)**

### Project List

- **Pharmacy Inventory Mgmt System (PIMS)**
  - Risk that a possible unstable go-live could impact Pharmacy IT and operations ability to resource Clinical Transformation.
  - Risk Impact: LG

- **Epic 2018 Upgrade**
  - Risk that a slip in the current upgrade timeline (Feb’19 go-live) could impact Epic environment availability for Clinical Transformation.
  - Risk Impact: G

- **UWMC/NWH Integration**
  - Risk that integration effort diverts operational leaders’ time and attention from Clinical Transformation. Also risk that design of integration program conflicts with design of Clinical Transformation.
  - Risk Impact: G

- **Improving Patient Access Initiative**
  - Risk that project’s demand for operations leaders and subject matter experts (SMEs) contends with Clinical Transformation’s demand for the same key resources. Also risk that design for this initiative conflicts with design from Clinical Transformation.
  - Risk Impact: G

- **Clinical Trials Management System (CTMS)**
  - Risk that CTMS demands more ITS Epic and integration resources than planned, and key ITS experts assigned to Clinical Transformation are required to keep CTMS timeline.
  - Risk Impact: G

- **UW Financial Transformation (UW-FT)**
  - Risk that key operational groups’ (Supply Chain, Finance) subject matter expertise is required during concurrent periods in excess of their capacity.
  - Risk Impact: G
Guiding Principles - Draft

• **Patient Centered Focus**
  – Pursue decisions that lead to high-quality care, patient safety, improved patient experience, solid clinical outcomes, and an overall decreased cost of care

• **One Patient, One View, One Story**
  – “One Patient, One View, One Story” across all UW Medicine facilities
  – Easily share data between all UW Medicine facilities

• **Patient Engagement Experience**
  – Create more opportunities for communication between the patient and their care team

• **Operationally Led and IT Supported**
  – Broad involvement of physicians, clinicians, staff, administrators, and IT is critical to the program’s overall success

• **Simplification and Standardization**
  – Use Epic as the Clinical and Revenue Cycle Core vendor
  – Identify best practices and standards of care
  – Make system-wide design decisions rather than individual, unit or department-specific in order to drive consistent outcomes
  – Standardize workflows across the organization as the opportunities present themselves
  – Challenge current practices, which may require changes in UW Medicine processes in order to streamline and simplify
  – Simplify system and continue to enhance patient and practitioner experience
QUESTIONS
NWH / UWP HR & LABOR INTEGRATION

Nicki McCraw
Assistant Vice President, UW Medicine Human Resources
Agenda

• Overview of:
  • Integration
  • NWH and UWP Program Structure
• HR & Labor Workstream Project
  • Objectives
  • Timeline
  • Project Teams and Governance
  • Key Risks
  • Current Status
Integration Overview

- NWH
  - NWH will become a second campus of UWMC, operating under a single hospital license and will be financially, clinically and administratively integrated. Resulting in:
    - Improved access to our patients
    - Better alignment of our clinical services
    - Improved financial performance
    - Reduced administrative complexity
  - The NWH entity will be dissolved as part of the integration

- UWP
  - Staff will become part of the School of Medicine, continuing to provide similar services to UWP
  - Both integrations will be completed on 1/1/2020
Overview of NWH Program

Executive Sponsor Committee
Chair: Lisa Brandenburg

Medical Staff
Hospital Operations
HR & Labor Group
FASC Group
Rev Cycle Group
Branding & Comm Group
Governance & Corporate Group
Physician Employment Group
Clinical Research Group

Project Management Workgroup
Workstream Leads Workgroup

Hospital-to-Hospital Workstreams
Shared Services Workstreams
Independent Workstreams

Legal Advisors
Overview of UWP Program

UWP Special Project Oversight Structure
February 21, 2018
CONFIDENTIAL

Executive Sponsors
Tim Dellit
Mindy Kornberg
Ruth Mahan
Margaret Shepherd

Steering Committee
Tim Dellit
Mark Green
Maureen Hooley
Mary Fran Joseph (lead)
Nicki McCraw

Legal Advisors
Henry Farber
David Kerwin
Margaret Peyton
Jessica Russell
Mike Tribble

Communications
Executive Sponsor
Tim Dellit
Nicki McCraw
Team Leads
Tim Dellit
Members
Mark Green
Maureen Hooley
Pete McGough
Margaret Peyton
Greg Schroedl
Debra Gussin

Finance (SoM)
Executive Sponsor
Mary Fran Joseph
Team Leads
Dave Green
Maureen Hooley
Members
Karen Schiller
Julie Reid
Erica Floyd
Christine Ward

Human Resources & Labor
Executive Sponsor
Nicki McCraw
Team Leads
Jackie Bardsley
Ryan Markowski
Steve Marty
Members
Emily Olafson
Mike Tribble
Marie Carter-Dubois
Nicki’s team *

Physician/Faculty/APP Issues
Executive Sponsor
Tim Dellit
Mary Fran Joseph
Team Lead
Julie Reid
Member
Ed Margo
Pete McGough
Deb Gussin
Barb Van Ess
Elsa Kassa
Susan Peterson
Marie Carter Dubois
Maureen Hooley
Objectives of HR & Labor Workstream

To integrate NWH and UWP staff into the UW via the following:

- Moving staff into UW employment with Washington state and UW benefits
- Defining and implementing a plan for managing non-employees who are currently tracked in the NWH and UWP HR and Payroll systems
- Resolving differences in policies and practices that exist between NWH, UWP and those in place at UW Medical Centers
- Adding NWH staff into Workday with a semi-monthly pay frequency
- Adding UWP staff into Workday within the UW School of Medicine, with a semi-monthly pay frequency
- Assessing the impact and designing and implementing a Workday solution to allow staff at NWH who are currently paid using the Actual Time Reporting (ATR) pay model to continue to be paid using ATR at UW
- Implementing UWMC’s instance of Kronos at NWH and UWP
- Implementing UWHires at NWH and UWP for staff and student hires (new hires, rehires, job changes and add jobs)
- Integrating the NWH and UWP HR and Payroll functions into the existing UW and UW Medicine HR and Payroll functions
Key Guiding Principles

• Standardize future-state processes, procedures and system configuration, justifying any exceptions, with the intent of aligning to existing UW builds, configurations and processes

• Seek out and define solutions for unique business needs and requirements of NWH and UWP
  • Four unique needs identified to-date
    • Two approved and included in scope
    • Two being prepared for review
# Timeline

<table>
<thead>
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<th>High-Level Task</th>
<th>Calendar Year 2018</th>
<th>Calendar Year 2019</th>
<th>Cal Year 2020</th>
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<td>July</td>
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<td>Sept</td>
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<tr>
<td><strong>General Schedule</strong></td>
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<td>Functional Work</td>
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<td>Data Conversion and Validation</td>
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<td>Design, Build, Unit Test:</td>
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<td>Workday Foundational Design</td>
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<td>Kronos</td>
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<td>End-to-End &amp; Payroll Parallel Testing</td>
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<td>Training Prep and Execution</td>
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<tr>
<td>Cutover and Support</td>
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Governance Provided by Leadership Group

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
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<tbody>
<tr>
<td>Nicki McCraw</td>
<td>Assistant VP, UW Medicine, HR &amp; Executive Sponsor</td>
</tr>
<tr>
<td>Tammy Ayyoub</td>
<td>Controller, UW Medicine</td>
</tr>
<tr>
<td>Anja Canfield-Budde</td>
<td>Associate VP, UW IT</td>
</tr>
<tr>
<td>Curtis Colvin</td>
<td>Director, Recruiting, UW Medicine HR</td>
</tr>
<tr>
<td>Peter Denis</td>
<td>Assistant VP, UW HR Labor Relations</td>
</tr>
<tr>
<td>Katy Dwyer</td>
<td>UW Benefits Expert, UW HR</td>
</tr>
<tr>
<td>Maureen Hooley</td>
<td>Chief Financial Officer, UWP</td>
</tr>
<tr>
<td>Stephanie Howe</td>
<td>Payroll Services Director, UW Medicine</td>
</tr>
<tr>
<td>Anne Jozaitis-Hole</td>
<td>Director, Workforce Mgmt Systems, UW Medicine HR</td>
</tr>
<tr>
<td>Amy Junglov</td>
<td>Compensation Manager, UW HR</td>
</tr>
<tr>
<td>Chong Yi Lucas</td>
<td>Director, Human Resources, NWH</td>
</tr>
<tr>
<td>Steve Marty</td>
<td>Director, Business Operations, UW Medicine HR</td>
</tr>
<tr>
<td>Eric Neil</td>
<td>Senior Director, Business &amp; IT Operations, UWM ITS</td>
</tr>
<tr>
<td>Matt Tuller</td>
<td>Director, Enterprise Business Systems, UWM ITS</td>
</tr>
<tr>
<td>Emily Olafson</td>
<td>Manager, HR, UWP</td>
</tr>
<tr>
<td>Jennifer Petritz</td>
<td>Director, Employee Relations, UW Medicine HR</td>
</tr>
<tr>
<td>Paula Ross</td>
<td>Director, Application Mgmt., Integrated Service Center</td>
</tr>
</tbody>
</table>

Role of Leadership Group

- Confirm required knowledge, competencies and team composition of project teams. Support the recruitment of the team members.
- Actively support and communicate the program’s directives.
- Within each person’s area of responsibility:
  - Ensure appropriate engagement
  - Assist the project team in clearing obstacles / challenges
- Approve and help prepare, gather data for and present recommendations going to the sponsor for approval.
- Participate in change management activities and help the project understand impact of business decisions.
- Bring risks and issues forward to the project team; own and help resolve risk and issues, as assigned.
- Review and provide feedback on high-level project documentation (charter, schedule, testing strategy, etc.)
Key Risks

• Staffing
  - HIGH - ISC and UW IT teams are dependent on a large number of hires to staff the project, many needed in January.
    - Hiring underway after receiving financial approval on 10/26
    - Reliance could be placed more heavily on consultants, but with a financial impact
    - Project complexity has reduced and requirements more concrete since latest staffing estimates. Next review of staffing plans in mid-December.
  - MODERATE - Key functional resources cannot devote enough time to the project
    - Teams are supported by backfill resources, where necessary
    - Needs assessed regularly based on staffing changes
Current Status

• Overall status is YELLOW, due to the UW IT & ISC staffing risk
• Many other known risks have been mitigated or greatly reduced by the work completed to date
• All HR & Labor workstreams are currently on schedule
  • Functional work (reports, contracts, work week change, payroll cutover, etc.)
  • Foundational design (Workday and downstream systems)
  • Kronos & UWHires design
  • Data conversion
  • Change management, training, communications
  • Labor relations
  • Future HR staffing plans/models
QUESTIONS
UW Finance Transformation

Brian McCartan
Vice President for Finance, UW Finance & Administration
2017 Conceptual Estimate

**Scope:**
- Phase 1: Financials, Procurement
- Phase 2: Budget/Planning
- $200m, Funding TBD

**Schedule:**
- 3 year “Big Bang”

---

**Jan 2018-July 2019 Readiness Phase**

**University-wide engagement**

**FT Governance Structure**

---

**Scope**
- How to organize UW financial work to maximize efficiency and drive down annual cost?
- How to integrate Workday into UW technology Environment?

**Schedule**
- Given other initiatives – what is optimal schedule?
- What is the trade off between big bang and phasing?

**Budget/Funding**
- What are the final costs? How do we allocate these? How can we reduce annual operating costs to pay for the program?

---

**Summer 2019: Baseline Project**

**Scope:**
- Set

**Schedule:**
- Set

**Cost Set**
- Funding Set
UW has made a decision to target a 3, and 4 where possible for the degree of transformation for the UWFT program, meaning there will be transformation of business processes as well as consolidation of services.
**UWFT READINESS TIMELINE**

**Operating Model**
- Benchmarking & Data Gathering
- Current State Understanding
- Future Operating Model

**Stakeholder Engagement**
- Governance & Decision Rights
- Leadership Alignment, Governance, and Change & Comms Strategy
- Leadership Alignment, Governance, and Change & Comms Execution

**Technical**
- System and Integrations Inventory
- IT Landscape
- Inventory and Requirements
- Future State Strategy

**FDM**
- Review of COAs and Reports Inventory
- FDM Kickoff and Current State
- FDM Discovery Workshops and Blueprint

**HRP Remediation**
- Review Production
- Prioritize Remediation Activities

**Workday Deep Dives**
- Process Maps / Inventory
- Deep Dive Sessions
- Prototyping
- Business Process Validation

**Program Management**
- Program Processes and Structure
- Program Management Activities
- Implementation Plan

**Timeline**
- Sept: Pre-Work
- Oct: Moments that Matter
- Nov: Operating Model
- Dec: Stakeholder Engagement
- Jan: Technical
- Feb: FDM
- Mar: HRP Remediation
- Apr: Workday Deep Dives
- May: Program Management
- Jun: On-track

**Events**
- Budget & Funding Plan Updated
- BOR Funding Approval & OCIO Approval
Design a future state Workday support/operating model

**Input:** Business Operating Model

**IT JOURNEY MAP**

1. **IT Operating Model Workshop** (11/27/18)
   - Analyze current state architecture
   - Design a future state Workday support/operating model

2. **Analyze current system and reporting inventory**
   - Identify which systems will be remediated, kept as-is, or retired
   - Input: BPT Activities, FDM Blueprint

3. **Create a future state systems architecture**
   - Input: Future State Process Design

4. **Develop a future state Workday support/operating model**
   - Input: Future State Operating Model

5. **Refine future state integration inventory estimates for systems to keep**
   - Input: Future State Architecture

6. **Create an estimated timeline to deliver a data integration platform solution**
   - Input: Data Integration estimates

7. **Create estimate to deliver a data integration platform solution**
   - Input: FDM Blueprint

8. **Create estimate to adapt UWM/UW-IT data warehouse financial data assets**
   - Input: Business Process Design & Transformation Activities, FDM Blueprint

9. **Determine reporting strategy**
   - Input: Future State Operating Model

10. **Create an estimated timeline to adapt UWM/UW-IT data warehouse financial data assets**
    - Input: Data Warehouse estimate

11. **Submit Estimate to Senior Leadership for Review** (March 2019)

12. **Submit Estimate**

13. **Finalize system retirement, data warehouse, and integration strategies**
    - Create an estimated timeline for systems to keep
    - Input: System Disposition

14. **Finalize system retirement, data warehouse, and integration strategies**
    - Create an estimated timeline for systems to keep
    - Input: System Disposition

15. **Create an estimated timeline to deliver a data integration platform solution**
    - Input: Data Integration estimates

16. **Analyze current system and reporting inventory**
    - Identify which systems will be remediated, kept as-is, or retired
    - Input: BPT Activities, FDM Blueprint

17. **Update future state integration inventory for systems to keep**
    - Input: System Disposition

18. **Develop estimated complexity and associated cost to remediate/retire/keep systems**
    - Input: System Disposition, FDM Blueprint

19. **Refine future state integration inventory estimates for systems to keep**
    - Input: Future State Architecture

20. **Create an estimated timeline to deliver a data integration platform solution**
    - Input: Data Integration estimates

21. **Create estimate to deliver a data integration platform solution**
    - Input: FDM Blueprint

22. **Create an estimated timeline to adapt UWM/UW-IT data warehouse financial data assets**
    - Input: Data Warehouse estimate

23. **Implement FDM Blueprint and Prototype Dimensions**

24. **Meet with Board of Regents** (June/July 2019)

**Legend:**
- **Milestone**
- **Technical Activities**
- **FDM Activities**
- **Activities outside Technical workstream scope**

**Implementation Activities:**
- Design and configure data integration platform solution
- Design and adapt UWM/UW-IT data warehouse financial data assets
- Design and build integrations
- Design and remediate systems
- Plan for retiring systems
- Design and build reports
QUESTIONS
Priorities and Sequencing

Aaron Powell
Vice President, UW-IT and Chief Information Officer
QUESTIONS
IT Governance Evaluation Update

Erik Lundberg
Assistant Vice President, Research Computing & Strategy, UW-IT
# ACTION PLAN

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Complete</th>
<th>Underway</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continue support for IT Governance Boards</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Keep current model</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Broaden representation</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Improve discussion and engagement</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Improve information flow between boards</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Retain advisory relationship with Provost</td>
<td>✔</td>
<td></td>
</tr>
</tbody>
</table>
INFORMATION TECHNOLOGY GOVERNANCE

IT Strategy Board

IT Service Investment Board

IT Service Management Board

President
Provost

Vice President for UW-IT and CIO

Guidance on Strategic Direction

Refer Issues; Provide Input

Direction on Changes to Services

Refer Issues; Provide Input

Provide Analysis; Identify Issues; Recommendations

Prioritize Projects; Recommend Funding Levels; TRF Review

Strategic Plans; Recommend Policies; Funding Strategies

Service and Process Improvement Recommendations

IT Boards supported by the Office of the VP for UW-IT and CIO
EVALUATION RECOMMENDATIONS

> Improve discussion and engagement
  – Prioritize Critical IT issues for inclusion in this year’s agenda
  – Plan agenda to allow time for discussion
  – Engage board in discussion on each agenda item

> Improve information flow between boards
  – Add standing agenda item to provide an overview of discussion at other board
Critical IT issues identified by both boards include the following categories:

- Teaching and learning
- Research support
- Administrative systems modernization (Finance Transformation, Workday – HR/P, and data integrations)
- Managing data
- IT Security and Privacy
- Other (central and decentralized IT, software site licensing, service optimization, Transformative IT, regional partnerships)
CRITICAL IT ISSUES – RECOMMENDATIONS

Recommended priorities for discussion this year:

> Administrative systems modernization
  – Finance Transformation
  – Major project sequencing and prioritization
  – Data integrations
> Managing data
> Security and privacy
> Transformative IT

Board input

> Are these the right issues?
> Anything missing?
> Other?
IT Project Portfolio Executive Review

Aaron Powell
Vice President, UW-IT and Chief Information Officer

Erik Lundberg
Assistant Vice President, Research Computing & Strategy, UW-IT
## UW Enterprise IT Projects

**Project Portfolio Executive Summary - Sep 30, 2018**

<table>
<thead>
<tr>
<th>Project</th>
<th>Oversight Level*</th>
<th>Overall Risk *** &amp; Project Health **</th>
<th>Budget Rating</th>
<th>Schedule Rating</th>
<th>Scope Rating</th>
<th>Issues Rating</th>
<th>Actual Cost (To Date)</th>
<th>Budget (Project Life)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical Transformation Program</td>
<td>3 - UW</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$2,650,000</td>
<td>$159,500,000</td>
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<tr>
<td>Finance Transformation Readiness</td>
<td>3 - OCIO</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>$12,342,016</td>
<td>$14,540,692</td>
</tr>
<tr>
<td>Pharmacy Inventory Management System</td>
<td>2 - UW</td>
<td>10</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>4</td>
<td>$1,457,147</td>
<td>$3,915,507</td>
</tr>
<tr>
<td>Northwest Hospital HR &amp; Labor Integration</td>
<td>2 - UW</td>
<td>11</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>4</td>
<td>$200,353</td>
<td>$1,033,000</td>
</tr>
<tr>
<td>Academic Personnel Applicant Tracking System</td>
<td>2 - UW</td>
<td>9</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>$129,337</td>
<td>$115,300</td>
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<tr>
<td>Burke Museum CRM</td>
<td>2 - UW</td>
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<td>4</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>$2,947,868</td>
<td>$3,316,350</td>
</tr>
<tr>
<td>F&amp;A Space</td>
<td>2 - UW</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>TBD</td>
<td></td>
</tr>
<tr>
<td>Transportation System Improvement Project</td>
<td>1 - UW</td>
<td>9</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>$700,678</td>
<td>$1,165,911</td>
</tr>
<tr>
<td>Continuum College CRM</td>
<td>1 - UW</td>
<td>17</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>$159,500,000</td>
<td>$159,500,000</td>
</tr>
</tbody>
</table>

### Completed

<table>
<thead>
<tr>
<th>Project</th>
<th>Oversight Level*</th>
<th>Go Live Date</th>
<th>Project Completion Date</th>
<th>Total Project Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
QUESTIONS AND DISCUSSION
APPENDICES:
UW Finance Transformation
**UWFT GOVERNANCE STRUCTURE**

*Administrative leadership for program team is VP Finance*
HOW TO GET THERE: UWFT GUIDING PRINCIPLES

- Senior leaders are engaged and unified in supporting UW Finance Transformation as a top administrative priority for the University of Washington. Leaders will provide focus needed to ensure a successful program.

- Future state processes, policies and procedures are standardized and simplified, to ensure substantial productivity gains across the enterprise, justifying any exceptions.

- The computing infrastructure and services are consolidated and integrated across the enterprise to eliminate redundancy, justifying any exceptions.

- Financial and management reports result from a trusted system of record with consistently applied data definitions, eliminating redundant and disparate data repositories.

- One of the key ways risk is mitigated is through clearly defined stage gates with entry and exit decision criteria.

- Broad University engagement and communication to define, design, and implement the future state vision will ensure all units are operational at launch.
LESSONS LEARNED FROM HRPM

> Focus on *business* transformation, not simply technology
> Scope, schedule and budget: If you change one, you impact all
> Engage the right people at the right time
> Focus on end-to-end processes
> Value voice, collaboration and the courage to course correct
> Leadership and Program Team speak with one voice
> Maintain UW commitment and momentum when turnover occurs
> Focus on reporting early
> Focus on operating model early
> Be candid and transparent about opportunities and challenges
BENCHMARKING & DATA GATHERING FINDINGS

<table>
<thead>
<tr>
<th>University-wide (includes Academy and Medicine)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benchmarking</td>
</tr>
<tr>
<td>176 units</td>
</tr>
</tbody>
</table>

* Rationalization analysis in process; current value does not include HR/Payroll that may need to be remediated with change in FDM

** Academy includes SoM; Medicine excludes Valley and SoM

**80% of units did not have process maps

*** Reports Survey: Units asked to report top 10 reports to initialize the inventory

Note: Excludes 488 of revenue cycle FTEs collected as part of benchmark but out of scope for UWFT
TODAY’S FRAGMENTED FINANCIAL SYSTEMS RESULT IN HIGH COSTS

> The UW’s total current cost for finance/procurement and supply chain is $226M/year, which according to the Hackett Group study is twice that of our peers

> This is made up of **1,707 FTEs and over 3,000 people**

> **1,046 Academy staff spend 10-30 percent** of their time on finance, procurement and supply chain (we did not collect any FTEs spending less than 10 percent)

> These findings are the **groundwork for data-driven decisions** that will help define and inform the UWFT Foundation Data Model, Change Management strategy, and the full Readiness Plan

> We have **close to 750 enterprise and unit systems** that support finance, procurement and supply chain processes

> We have **close to 1,000 integrations** in these areas
What is an Operating Model?

Operating Model

- An operating model is a blueprint and design that connects an organization’s strategic vision and business model with its detailed business processes.
- The operating model answers the question “What are the fundamental capabilities and competencies and where do they get executed?”
- The operating model provides the visual representation of how an organization delivers value to its internal and external customers.
- The Target Operating Model (future state) design helps to illustrate how to best organize the capabilities in order to deliver more efficiently and effectively on the organization’s strategy.

What it is

- Operating model clearly articulates the vision and operating objectives of the finance and supply chain functions including catalog of services.
- It identifies the capabilities required to perform these services.
- It outlines where key processes/sub processes are being executed.
- It provides the framework for a new organizational design.
- It determines the service levels, including degree of standardization, proximity to stakeholders, and the location in which these services need to be performed.

What it isn’t

- Operating Model is not the organization design and creation of organization structure that delineates the direct and indirect reporting relationships between different positions.
- It does not highlight the delegation of authority and decision making within the organization.
- It does not define the roles and activities of the different organizational positions.
- Not an ‘end’ in itself.
Operating Model - Guidance from Sponsors

We will use the following set of guidelines when defining the future state Operating Model for Finance and Plan and Manage the Business for the University of Washington:

<table>
<thead>
<tr>
<th>Operating Model Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Requirements</strong></td>
</tr>
<tr>
<td>- Strive to design common Policies, Processes and an Efficient Operating Model <strong>WHILE</strong> ensuring critical business requirements are met</td>
</tr>
<tr>
<td><strong>Degree of Transformation</strong></td>
</tr>
<tr>
<td>- Strive to achieve the highest degree of transformation* by establishing standard Policies and Processes enabled by a Cloud based ERP and Operating Model</td>
</tr>
<tr>
<td><strong>Future-Oriented</strong></td>
</tr>
<tr>
<td>- Design the Operating Model to be flexible and to support achievement of future strategic goals</td>
</tr>
<tr>
<td><strong>Benefit Realization</strong></td>
</tr>
<tr>
<td>- Savings and other productivity gains derived from this transformation are expected</td>
</tr>
</tbody>
</table>

* Transformation refers to automation and centralization of services. This includes a high degree of transformation with a leading operating model structure irrespective of ERP.
Operating Model Framework

A 2 x 2 framework helps to assess processes in terms of value addition and proximity to the business.

**Axis #1:** Is the process done by a team that serves multiple units / entities or on-site by an individual unit / entity?

**Axis #2:** What is the nature of the activity and how does it add value?

### Method of Adding Value

<table>
<thead>
<tr>
<th>Transactional</th>
<th>Knowledge Based</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity that is <strong>manually intensive and routine</strong></td>
<td>Activity that is <strong>highly specialized</strong>, and requires <strong>judgment and deep understanding</strong> of the business</td>
</tr>
</tbody>
</table>

**Transaction:**
- **Specific Unit / Entity Specific**
- **Shared**

**Knowledge:**
- **Specific Unit / Entity Specific**
- **Shared**
The workshops will focus on our current configuration in Workday. HRP remediation relates to the changes to configuration and other work (Examples include: re-conversion of costing allocations with changes to Foundation Data Model (FDM) and implementation of Payroll Accounting Adjustments) that will be required to implement Workday Financials. Optimizing HRP is not the focus of HRP remediation.

### HRP Remediation Workshops

<table>
<thead>
<tr>
<th>Workshop Topic</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remediation Kick-Off</td>
<td>Wednesday, November 7, 1-2 pm</td>
</tr>
<tr>
<td>HCM Core</td>
<td>Thursday, November 8, 1-4 pm</td>
</tr>
<tr>
<td>Compensation</td>
<td>Thursday, November 15, 9:30-11:30 am</td>
</tr>
<tr>
<td>Benefits</td>
<td>Thursday, November 15, 12:30-2:30 pm</td>
</tr>
<tr>
<td>Absence</td>
<td>Thursday, November 29, 9:30-11:30 am</td>
</tr>
<tr>
<td>Time Tracking</td>
<td>Thursday, November 29, 12:30-3:30 pm</td>
</tr>
<tr>
<td>Payroll</td>
<td>Thursday, December 6, 12-4 pm</td>
</tr>
<tr>
<td>Findings/Wrap Up</td>
<td>Tuesday, December 18, 1-3 pm</td>
</tr>
</tbody>
</table>

**Topics:**
- Understand previous implementation scope and business processes that will impact UWFT
- Review current HCM, Payroll, Benefits, Absences, and Time Tracking configuration in UW Production
- Inventory configuration considerations in a “solution catalog” of the impacted areas

**Outputs:**
- Creation of a “solution catalog” to prioritize remediation, re-conversion (i.e., costing allocations based on how they were converted), and associated level of effort
- Used as an input to the Foundation Data Model design

*Iterative Design Process* - The HRP Remediation Workshops are an important venue to provide input on the future state design, but do not represent your only opportunity to provide feedback as illustrated in the roadmap below.
### HRP Remediation Scope Examples

In considering HRP remediation, we must first determine the scope of associated activities. Below we have outlined HRP remediation activities. To the extent possible, we need to understand the other organizational initiatives that will impact remediation.

<table>
<thead>
<tr>
<th>Review Production Tenant</th>
<th>Minimum Configuration for Workday Financials (WDF) Deployment</th>
<th>Considerations for Deployment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Review Production</strong></td>
<td><strong>Worktag Balancing (Fund, etc.)</strong></td>
<td><strong>Considerations for Deployment</strong></td>
</tr>
<tr>
<td>• Understand previous implementation scope and business processes</td>
<td>• Turn on worktag balancing in tenant</td>
<td>• Plan the activities collected from the prioritized Production “solution catalog” review that can be conducted before, during or post WDF implementation</td>
</tr>
<tr>
<td>• Conduct a HRP remediation approach kick-off meeting to review upcoming activities</td>
<td>• Assign the required balancing worktag to the offset side of journals</td>
<td>• Align activities to operational processes in production</td>
</tr>
<tr>
<td>• Review current HCM, Absence, Benefits, Compensation, Payroll, and Time Tracking configuration in your Production Tenant</td>
<td>• Balance all transactions by additional worktags to eliminate manual processing and other balancing efforts</td>
<td></td>
</tr>
<tr>
<td>• Impact assessment of changes to data conversion because of FDM changes</td>
<td><strong>Organizational Assignments and Costing Allocations</strong></td>
<td></td>
</tr>
<tr>
<td>• Inventory configuration considerations in a “solution catalog” of the impacted areas</td>
<td>• Assign organizational assignments (default organizations for a position or worker) and costing allocations (ad hoc or during staffing events)</td>
<td></td>
</tr>
<tr>
<td>• Conduct workshops to prioritize remediation, re-conversion (i.e., costing organizations based on how they converted it), and associated level of effort</td>
<td><strong>Account Posting Rules</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Worktag Balancing (Fund, etc.)</strong></td>
<td>• Create accounting posting rules based on company accounting detail</td>
<td></td>
</tr>
<tr>
<td>• Turn on worktag balancing in tenant</td>
<td>• Map ledger account and resulting worktag of spend category based on pay component (earning/deduction) and worker/position attributes</td>
<td></td>
</tr>
<tr>
<td>• Assign the required balancing worktag to the offset side of journals</td>
<td><strong>Object Class Mapping</strong></td>
<td></td>
</tr>
<tr>
<td>• Balance all transactions by additional worktags to eliminate manual processing and other balancing efforts</td>
<td>• Review object class based on the spend category or pay component group associated with expenses for grant related spend</td>
<td></td>
</tr>
<tr>
<td><strong>Organizational Assignments and Costing Allocations</strong></td>
<td>• Confirm Workday Payroll earnings are correctly separated in object classes</td>
<td></td>
</tr>
<tr>
<td>• Assign organizational assignments (default organizations for a position or worker) and costing allocations (ad hoc or during staffing events)</td>
<td><strong>Effort Certification/Grants Configuration</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Account Posting Rules</strong></td>
<td>• Review effort certification configuration (evaluate current functionality/requirements against Workday functionality)</td>
<td></td>
</tr>
<tr>
<td>• Create accounting posting rules based on company accounting detail</td>
<td>• Confirm functionality around Workday Grants Management and Payroll configuration needs to process payroll related grant spend including Costing Allocations and Salary Over the Cap</td>
<td></td>
</tr>
<tr>
<td>• Map ledger account and resulting worktag of spend category based on pay component (earning/deduction) and worker/position attributes</td>
<td><strong>Payroll Accounting Adjustments</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Object Class Mapping</strong></td>
<td>• Review Payroll Accounting Adjustments process and configuration(evaluate current functionality/requirements against Workday functionality)</td>
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<tr>
<td>• Review object class based on the spend category or pay component group associated with expenses for grant related spend</td>
<td>• Verify costing allocations on the position restrictions are set for payroll commitment (unfilled positions) accounting</td>
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<td>• Confirm Workday Payroll earnings are correctly separated in object classes</td>
<td><strong>Fringe Benefits/Commitment Accounting</strong></td>
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<tr>
<td><strong>Effort Certification/Grants Configuration</strong></td>
<td>• Ensure payroll salary and fringe benefits are mapped to pay component group versus spend category</td>
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<td>• Review effort certification configuration (evaluate current functionality/requirements against Workday functionality)</td>
<td>• Review payroll and fringe are enabled for commitments and/or obligations</td>
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<tr>
<td>• Confirm functionality around Workday Grants Management and Payroll configuration needs to process payroll related grant spend including Costing Allocations and Salary Over the Cap</td>
<td>• Revise payment commitment rules based on earnings and compensation</td>
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<td><strong>Account Posting Rules</strong></td>
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</table>
# Readiness Work By IT Pillar

<table>
<thead>
<tr>
<th>Pillar</th>
<th>Description</th>
<th>Definition of Done</th>
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</thead>
<tbody>
<tr>
<td>Technology Change</td>
<td>Work associated with remediating or retiring function application systems due to the replacement of the primary Finance system. Includes analysis and development associated with archiving data from those same systems.</td>
<td>• All systems known to date dispositioned as remediate, keep as-is, or retire (includes retire/remediate decision criteria) • Estimated cost computed to remediate, retire, and keep systems (includes change management/training estimates)</td>
</tr>
<tr>
<td>Management</td>
<td>Work associated with extracting data from one system for delivery and consumption by a second system.</td>
<td>• Defined number of integrations that will continue in future state and associated complexity • Confirmed data integration platform solution strategy and timeline and associated estimated cost</td>
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<tr>
<td>Data Integration</td>
<td>Work associated with enterprise data modeling, design and development of data warehouses, reports and queries related to enterprise reporting. Efforts to develop training tools for users of these data resources and develop custom reports using Workday Analytics.</td>
<td>• Establish single inventory of reports, identification of reports that can be consolidated, and defined reports to be generated from Workday or EDW • Complexity and criticality estimates of reports • Confirmed EDW strategy, timeline and associated estimated cost</td>
</tr>
<tr>
<td>Analytics / BI</td>
<td>Work associated with extracting data from sun setting systems, developing transformations and preparing data loads into Workday, and development of a FDM translator from the legacy Chart of Accounts into Workday's FDM.</td>
<td>• Confirmed systems of record for data conversion activities (including data source and data type for enterprise systems being remediated) • Defined approach for FDM converter</td>
</tr>
<tr>
<td>Security /</td>
<td>Security policy and guardrails to ensure the Workday data privacy, quality and integrity is retained and protected from malicious threats. Analysis and development to support single sign-on with two factor authentication for all users.</td>
<td>• Defined Security Roles / Personas • Validation of Implementation Resource Estimate</td>
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<tr>
<td>Accessibility</td>
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APPENDICES:
Critical IT Issues - Details
Critical IT Issues

> Teaching and Learning
  > Data analytics dashboards (rapid access to student data)
  > Wi-Fi needs to be pervasive
  > Adaptive technologies in classroom (universal design)
  > Need to answer the question at an institutional level – are we adopting a single strategy for the University or having each campus, school/college, department adopt its own based upon individual needs?
  > Examples: different student analytics systems at UW Tacoma and UW Bothell; Continuum College; different admissions processes

> Research Support
  > The University under-invests in research computing support
Administering Systems Modernization

> Finance Transformation
> Need to clarify and communicate overall long-term institutional strategy
> Need an institutional funding strategy that doesn’t rely on taxes
> Need to address capacity issues, including how the University will support FT along with other major projects
> Need to incorporate lessons learned from HR/Payroll
> Need to ensure early engagement from key stakeholders across the UW
> Need to address the impacts — both transformative and disruptive

> Workday – HR/P
> Need to address current issues and make the system work effectively for the UW

> Data integrations
> Need interoperability between administrative systems
> Need to recognize the complexities involved in data integrations, view as a priority, and adequately resource i2325
Critical IT Issues (continued)

> Managing Data
- Need capability to manage data of increasing volume and complexity, while addressing cybersecurity issues
- Need a strategic and holistic plan at the institutional level for how to manage data — it’s an issue of competitive advantage for the UW

> Security and Privacy
- Need to scale-up cybersecurity, especially in the University’s decentralized environment, and with the emergence of the Internet of Things
- Need to address how to protect clinical, student, and research data, especially with data intensive advancements such as genomics and precision medicine
- Phishing is increasingly sophisticated and pervasive
Critical IT Issues (continued)

> Other issues

– **Central and decentralized IT:** need to leverage central, enterprise-wide IT to create efficiencies, use resources wisely

– **Software site licensing:** how to structure it to take advantage of economies of scale?

– **Service optimization:** what services can be decommissioned to create capacity for innovation?

– **Transformative IT** — a tendency to focus on risks versus the potential for IT to drive transformation (academic, clinical, and administrative)

– **Regional partnerships:** how the UW is connected to the larger network of regional and national partners