






# UW ENTERPRISE IT PROJECTS EXECUTIVE SUMMARY AS OF JUNE 30, 2019

Project	Sponsor	Oversight Level	Overall Risk & Project Health	Budget	Schedule	Scope	Resource	Issues	Actual Cost	Budget
Destination: One	Carlos Pellegrini	3-UW							\$37,433,760	\$159,500,000
Finance Transformation Readiness	Mark Richards	3-OCIO							\$13,170,000	\$25,050,000
Advancement CRM Replacement	Julie Brown Dan Peterson	3-OCIO							\$612,010	\$4,000,000
Clinical Trials Management System	John Slattery	2-UW							\$10,729,088	\$15,703,970
Northwest Hospital HR & Labor Integration	Nicki McCraw	2-UW							\$5,744,000	\$14,974,000
Pharmacy Inventory Management System	Shabir Somani	2-UW							\$14,009,964	\$14,751,987
HFS Point of Sale	Pam Schreiber	2-UW							\$10,000	\$900,000
F&A Space	Sue Camber	2-UW							\$0	\$246,000
Transportation System Improvement Project	John Chapman	1-UW							\$3,116,384	\$3,316,000
ICA Group Sales	Erik Jones	1-UW							\$0	\$500



Oversight Level Key
<p><b>1.</b> Overseen by UW management and staff. Requires OCIO approval and reporting if over delegated authority.</p>
<p><b>2.</b> OCIO approval required and regular project reporting. Quality Assurance reporting required, may be internal or external. OCIO may recommend project to be full Technology Services Board (TSB) oversight.</p>
<p><b>3.</b> 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	
	<p>Project is on time, on budget, and within defined scope, with minimal issues.</p> <p><b>Overall Risk Rating where 5-10 is Green</b></p>
	<p>Changes to scope, budget, or resources have placed project at some risk. Project has the potential for delays, cost or scope changes.</p> <p><b>Overall Risk Rating where 11-17 is Yellow</b></p>
	<p>Major changes to scope, budget or resources have placed project at critical risk. One or more of the following must change in order to proceed: project schedule, resources, budget, scope.</p> <p><b>Overall Risk Rating where 18-25 is Red</b></p>

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

IT Project Risk Ratings (summed to calculate Overall Health Rating)
<p>Use the scale below to rate current performance on <b>BUDGET, SCHEDULE and SCOPE</b> (select appropriate number for each)</p> <p>1 = Performing better than project plan; ahead by 5% or more (<b>GREEN</b>)</p> <p>2 = Performance is on plan (<b>GREEN</b>)</p> <p>3 = Behind plan, but within 5% of original targets (<b>YELLOW</b>)</p> <p>4 = Behind plan between 6% to 10% and likely to use/using contingency (<b>YELLOW</b>)</p> <p>5 = Greater than 10% behind plan and more than half of contingency used (<b>RED</b>)</p>
<p>Use the scale below to rate current performance on <b>RESOURCES</b>. People with the necessary expertise are...</p> <p>1 = In place, or high likelihood of being available as specified in the Resourcing Plan (<b>GREEN</b>)</p> <p>2 = There are some minor gaps in resourcing, but can be overcome with minor alternations of the Resourcing Plan, with no significant impact on schedule, budget or deliverables (<b>GREEN</b>)</p> <p>3 = Somewhat in place, or struggling to perform, with moderate risk to schedule, budget or deliverables (<b>YELLOW</b>)</p> <p>4 = There are gaps in resourcing, with moderately high risk to schedule, budget or deliverables. Mitigation plans in place, or will be soon (<b>YELLOW</b>)</p> <p>5 = Not in place, or low likelihood of being available per the Resource Plan. Significant impact on schedule, budget or deliverables, without mitigation plans in place (<b>RED</b>)</p>
<p>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)</p> <p>1 = No risks or issues identified at this time (<b>GREEN</b>)</p> <p>2 = Some identified but minor, no impacts anticipated (<b>GREEN</b>)</p> <p>3 = Some that could impact the project are being managed, with minimal impact anticipated (<b>YELLOW</b>)</p> <p>4 = Significant risks/issues/other factors identified but not yet managed (<b>YELLOW</b>)</p> <p>5 = Risks/issues being managed but will have significant impact (greater than 10%) on project budget, schedule and/or scope (<b>RED</b>)</p>

Project Portfolio Executive Summary - Jun 30, 2019

Destination: One										
Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
<b>Destination: One</b>	Carlos Pellegrini	3 - UW	10	2	2	2	2	2	\$37,433,760	\$159,500,000
<p>Project Status:</p> <p>After significant investigation evaluating the impacts of different Go-Live scenarios, the decision was made to move the Go-Live to October 2020 as a "big bang", bringing all departments and functionality live at the same time.</p> <p>Since the decision was made and approved by stakeholders, the Destination: One Program has been in a state of transition as Program and ITS leadership have been focused on refining milestones, incorporating dependencies, and otherwise aligning the Program toward the October, 2020, Go-Live event. The core implementation project plan is still in development but nearing completion.</p> <p>Matt Lambert left as Physician Program Manager. Several candidates are under consideration to fill this critical position, which remains a high priority for Program leadership. Each of the key work streams in this area have interim owners to maintain progress and they will be transitioned to the new leader when he/she joins the Program. On June 4th, Hany El-Osman, the Technical Program Manager, announced his resignation from the Program. He has provided ample time to complete transition materials and identifying a back-fill for his role is underway.</p> <p>In recent weeks, deeper conversations around Testing, Training, Goals/Benefits Realization and Data Conversion have been underway. With the extra time afforded to the Program, there is a great opportunity to enhance delivery in each of these critical areas. Operational and ITS leadership have partnered to "right-size" each of these focus areas for UW Medicine with a goal of maximizing staff engagement in the process.</p> <p>High Level Timeline:                      - Groundwork Phase - Oct-Nov'18 - COMPLETE                      - Discovery Phase - Dec'18-Jan'19 - COMPLETE                      - Adoption Phase - Jan-Sept'19 - ONGOING                      - Testing Phase - Sept'19-Jun'20                      - Training &amp; Go-Live Phase - Jun-Oct'20                      - Post-Live &amp; Stabilization Phase - Oct-Jul'21</p> <p><i>per Rich Selenis 7/19/19</i></p>										

Project Portfolio Executive Summary - Jun 30, 2019

Finance Transformation Readiness										
Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
<b>Finance Transformation Readiness</b>	Mark Richards	3 - OCIO	10	1	2	1	3	3	\$13,170,000	\$25,050,000
<p>Summary: UWFT successfully completed the Readiness Phase on 6/30/19. On 6/25, the Executive Sponsors approved the Program completing Readiness and moving forward with the Board of Regents ask for Stage 1 Approval for the Design Phase (Board of Regents approval received on 7/11/19)</p> <p>All milestones reached for the Readiness Phase. Highlights include:</p> <ul style="list-style-type: none"> <li>- Readiness Outcome Report</li> <li>- RAID Management Plan Implementation</li> <li>- Schedule, Scope and Budget for Design Phase</li> <li>- Conceptual Op Model Direction &amp; Roadmap</li> <li>- Future State Op Model Options V1.0</li> <li>- FDM Blueprint v1.0</li> <li>- BP Deep Dive Session conducted</li> <li>- Traceable Requirements Framework established</li> <li>- Decision on ATR &amp; Bi-Weekly Payroll for UWFT</li> <li>- HRP Solution Catalog V1.0</li> <li>- IT System, Integration and Report Inventories</li> <li>- Foundation for IT Cost Estimation</li> <li>- Stakeholder Engagement &amp; Communication Strategies</li> <li>- Unit Profiles</li> <li>- Change Impact Analysis</li> </ul> <p>Risks/Issues:</p> <ul style="list-style-type: none"> <li>• The delay in approving and hiring resources for the Readiness phase has a medium likelihood of impacting the effectiveness of the UW translation &amp; socialization of Deloitte deliverables. With the addition of the Design phase, the Team will be distributing resources across a longer timeframe. Once that is completed we may be able to retire this risk.</li> <li>• Three large initiative projects have overlapping resource demands from IT and business units across the University with puts one or more of the programs at risk of not meeting deliverables. With the addition of the Design phase, the Team will be accessing resources across a longer timeframe. Leaving this risk on the report until more analysis is completed.</li> </ul>										
<p><i>per Debra Fromholzer 7/16/19</i></p>										

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Advancement CRM Replacement										
Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
<b>Advancement CRM Replacement</b>	Julie Brown Dan Peterson	3 - OCIO	10	2	2	2	2	2	\$612,010.00	\$4,000,000
<p>Status:</p> <ul style="list-style-type: none"> <li>-Investment plan is completed and approved by OCIO.</li> <li>-Requirements gathering and development have been completed for Phase 1, Sprint 1 &amp; 2 and in progress for Phase 1, Sprint 3a-b and Phase 2, Sprint 4 &amp; 5 (allocations and basic gift processing).</li> </ul> <p>Schedule</p> <ul style="list-style-type: none"> <li>-Project Managers from Advancement and UW-IT are meeting weekly to define mutual priorities, identify key participants, and initiate meetings/communication with UW-IT resource allocation decision makers. These parties will collaborate to develop a project roadmap that will inform UW-IT of priorities and scope, and facilitate optimal resource planning.</li> <li>-Working with xRM to update the project schedule for MSSA</li> </ul> <p>Scope</p> <ul style="list-style-type: none"> <li>-UW &amp; xRM team spent 1.5 days reviewing the out of the box functionality for upcoming phases (gifts/giving, stewardship, biographic data, membership and marketing).</li> <li>-Reviewed prospect disqualification user stories with xRM.</li> <li>-Second round ETL/iPaaS (Extract Transform Load / integration Platform as a Service) onsite workshop/demo from Dell Boomi. Team met briefly afterwards to discuss feedback on the product.</li> <li>-Reviewed the change management plan for a plan and shared with Allen a draft document for review and feedback.</li> <li>-Partnered with xRM and reviewed miss-matches in original data upload to identify the necessary changes.</li> </ul> <p>Resources</p> <ul style="list-style-type: none"> <li>-Quality Assurance Test Analyst position is approved by Central HR</li> </ul>										
Per Julie Ngo 07/23/2019										

Project Portfolio Executive Summary - Jun 30, 2019

Clinical Trials Management System										
Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
<b>Clinical Trials Management System</b>	John Slattery	2 - UW	10	2	2	2	2	2	\$10,729,088	\$15,703,970
<p>Summary: (June 30, 2019 - An introductory project summary is included below as this is the first status report for this project.)</p> <p>Fred Hutchinson Cancer Research Center (Fred Hutch) together with Seattle Cancer Care Alliance (SCCA) and University of Washington (UW) are implementing and operating a Clinical Trials Management System (CTMS). The UW benefits from a CTMS by enhanced reporting and simplifying research budgeting and billing compliance. Also, these three institutions comprise three quarters of the FH/UW Cancer Consortium (Cancer Consortium). The Cancer Consortium's primary driver for a CTMS is to enhance regulatory reporting capabilities as required to maintain Cancer Center Support Grant (CCSG) funding, provided by the National Cancer Institute. Without a CTMS, the UW is using standalone spreadsheets, manual processes and email to manage research budgeting and billing.</p> <p>Implementation began formally with the approval of an investment plan in March 2016. The project is governed by an Executive Sponsor Steering committee which consists of three executives from each participating institution. The project is operated under an overarching Memorandum of Agreement (MOA) between the three institutions. The information technology platform, the vendor software (Forte OnCore), and IT support are provided as a service by UW Medicine Information Technology Services (ITS). The CTMS program business office (the CTMS Program Office) is located at the Fred Hutch and is led by a Program Director who is accountable to the Executive Sponsors. Operations of the CTMS commenced in FY19 and the implementation phase will continue until FY23 in three phases (targets).</p> <ul style="list-style-type: none"> <li>- Target 1 consisted of subject and protocol migration for oncology,</li> <li>- Target 2 consists of subject and protocol migration planning for non-oncology, and</li> <li>- Target 3 consists of UW Medicine non-oncology onboarding, and system wide financial and billing functions and compliance.</li> </ul> <p>Project Status:</p> <ul style="list-style-type: none"> <li>• Target 1 is complete with Go-Lives on July 16, 2018 and September 17, 2018.</li> <li>• Target 2 is complete with Go-Live on September 30, 2018.</li> <li>• In FY19 CTMS Program operations commenced.</li> <li>• In FY20 Executive Sponsors approved a revised Project plan from FY20-FY23 for Target 3.</li> <li>• CTMS Program Director hired in June 2019 (Fred Hutch employee).</li> <li>• Executive sponsors have extended the existing MOA until September 2019 and are currently revising the overarching Memorandum of Agreement between the Fred Hutch, the SCCA, and UW.</li> <li>• Planning and early design is currently in progress for Target 3, with full design expected to begin in September 2019</li> <li>• A pilot Go-Live of Target 3 functionality for an initial set of study teams is planned for March 2021. Rolling Go-Lives for four additional study teams will continue until December 31, 2021.</li> <li>• The project will be considered complete after the pilot group and the four other identified groups are live. Additional rollouts will extend through June 30, 2023, which will be addressed as part of CTMS Operations.</li> <li>• Currently managing resource risk: Hiring for project team for Target 3 is proceeding slower than planned with light pipeline for several key positions. Team is exploring alternative resourcing models.</li> </ul>										
<p><i>per Rich Selenis 07/19/2019</i></p>										

Project Portfolio Executive Summary - Jun 30, 2019

**Northwest Hospital HR & Labor Integration**

Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
<b>Northwest Hospital HR &amp; Labor Integration</b>	Nicki McCraw	2 - UW	11	2	2	2	2	3	\$5,744,000	\$14,974,000

Status: All HR & Labor project work streams are moving forward according to plan.

Technical Update:

Project phase 4, System Design, Build, Configure, Unit Test, completed on 6/21. This phase spanned prototype one and two in the Workday environment and included the design, build/configuration and unit testing of all changes to systems and integrations impacted by the project's business requirements. This includes Workday, Kronos and UWHires and systems that interact with these systems. It also included the converting and validation of the data of both NWH and UWP staff employee populations. Risks associated with delays in staffing ISC and UW IT technical teams have been successfully mitigated.

Change Management and Training:

Work continues on the training needs assessment, building on the understanding of changes NWH and UWP employees would go through that are documented in the change impact log. The Training Lead joined the project and has begun to work with all of the NWH/UW integration workstreams. A change management toolkit to help managers communicate with and support their staff with the transition has been introduced.

Benefits Pre-Enrollment:

The scope of early enrollment has been completed and a workplan put together. A prototype of the solution has been configured and unit testing is underway. A solution was also defined to allow physicians/APPs that will be transitioning to UW benefits to enroll early.

Functional Work:

Preparations to shift the work week and implement a midnight divide at NWH are complete. The transition to the UW workweek begins on July 8th. Work to migrate contracts and compare processes continues. A series of benefit orientation sessions has been held at UWP, NWH and for the physicians who will be transitioning. The initial mapping of UWP positions was communicated to transitioning staff. Work continued on preparations for being able to communicate mapping at NWH.

Testing:

Readiness activities for end-to-end testing, round 1, have been completed and execution of this first phase of testing began on 6/24. Preparations continue for payroll parallel and benefits early enrollment testing scheduled for the 3rd quarter.

Project Budget:

The budget has been adjusted to include changes from the FY20 budget process and an additional \$365K approved for benefits early enrollment. Overall, the project is running under budget through May 2019 and is forecasted to be under budget at the end of the project.

Sponsor: Nicki McCraw

Per Ryan Markowski 07/10/2019

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**Pharmacy Inventory Management System**

Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
<b>Pharmacy Inventory Management System</b>	Shabir Somani	2 - UW	11	2	3	2	2	2	\$14,009,964	\$14,751,987

Project Status: The Pharmacy Inventory Management System (PIMS) project is scheduled to go live at Harborview Medical Center (HMC) on August 25, 2019. The cutover to go live will start on August 5th when the pharmacy will begin purchasing in Elite (the PIMS application) for about 1250 medications that are stored in one of two carousels. This inventory will not be dispensed until go live on August 25th. Beginning the week of August 12th, the pharmacy will begin moving current inventory into the production system. This is projected to take approximately 10 business days. During the actual go live weekend, the go live team will cycle count all medications to ensure the inventory is accurate at go live.

In preparation for go live, the HMC specific build will be moved into PROD beginning the night of July 8th extending through July 24th. The loads will be done during the hours of 12AM and 4AM to reduce impact to the current production system. On July 11th the final load testing will be performed in Elite replicating HMC and UWMC.

At go live, the staff will be supported by super users from HMC, super users and management from UWMC, onsite vendor resources and the PIMS project team. Go live support will be 24x7 and scheduled out through September 20th if needed. During this time period, the PIMS project team will also be supporting UWMC pharmacy.

The project is currently tracking to the August 25th date. End to End testing is complete, technical dry runs are complete, staff training is scheduled, training content is in final review and operational cutover details are being finalized.

- The major milestones defined in the current baseline:
- Build Complete - June 30, 2018 - COMPLETE
  - Testing Complete – August 31, 2018 - COMPLETE
  - Training Complete – September 26, 2018 - COMPLETE
  - UW Medical Center (Site 1) Go-Live – COMPLETE
  - Harborview Medical Center (Site 2) Go-Live – August 25, 2019
  - Northwest Hospital Go-Live – Removed from Scope
  - Seattle Cancer Care Alliance - Removed From Scope
  - Project Close-Out – September 30, 2019

Budget limit of \$14,911,000 was approved from Senior UWM Leadership on 4/19/19. The current forecast as of June 30th is \$14,751,987.

Per Rich Selenis 7/19/2019



Project Portfolio Executive Summary - Jun 30, 2019

**HFS Point of Sale**

Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
HFS Point of Sale	Pam Schreiber	2 - UW	12	2	2	2	3	3	\$10,000	\$900,000

Status:

The team finalized the contract on June 24th (roughly one month behind the projected date of May 22nd). The HFS PM and Volante PM are working through the scheduling details to manage to the critical path. Prior to vendor selection the project budget used a placeholder of \$1m. The value was reduced to \$900k for this update to reflect the final approved budget post vendor selection.

The \$10,000 has been spent for Transaction Integration Application (TIA) fee. \$298,675 will post in the next report due to the hardware order.

The Resource Rating remains at a 3 and we continue to monitor team bandwidth.

Per Ethan Owens 07/17/19

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F&A Space										
Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
F&A Space	Sue Camber	2 - UW	0						\$0	\$246,000
<p>Project Status:                      This project has been on hold and it is too early to make accurate project health rating assessments.</p> <p>A new project manager, Colleen Bettis, has been hired and is expected to start on July 30th, 2019. Her first goal will be to identify the project team and to get the RFP out in the month of August.</p> <p>There has not been an actual cost as of yet other than MAA staff time gathering the information for the RFP and creating a job description.</p>										
Per Guadalupe Valencia 7/25/19										

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Transportation System Improvement Project										
Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
Transportation System Improvement Project	John Chapman	1 - UW	9	2	2	2	1	2	\$3,116,384	\$3,316,000
<p>Project Status:                      Integration of permits from our proprietary software system "Wheels" into the T2 Software system is ongoing with the permit configuration projected to be completed later this year.</p> <p>The next milestone 'Billing by T2 contractor' will happen once the new permits "go-live" later this year or early next year.</p> <p>PaybyPhone is a secondary mobile pay technology used to integrate visitor parking options into our Parking software along with license plate recognition (LPR) with costs of PaybyPhone implementation borne by the contractor. The cost of the software is based upon number of transactions conducted using the PaybyPhone application once implemented which is projected to be completed by end of September.</p> <p>The LPR vehicle equipment installations scheduled for the first part of July with billing for equipment to follow.</p>										
Per Eric Johnson 7/27/19										

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ICA Group Sales										
Project	Sponsor	Oversight Level*	Overall Risk *** & Project Health **	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
ICA Group Sales	Erik Jones	1 - UW	8	2	2	2	1	1	\$0	\$500
Status: nothing to report at this time, we anticipate onboarding to begin in July with the vendor (FEVO).										
Per Bess Hampsch/ 6/28/19										