AGENDA

> Call to Order
  – Welcome and introductions

> Top 1 – 2 IT Issues – Input from Board

> COVID-19 Impacts
  – Impacts on IT for teaching and learning

> UW Finance Transformation
  – Decision on Operating Model and HUBS
  – Change Management approach

> Top 1 – 2 IT Issues discussion

> Wrap up
Top 1 – 2 IT Issues – Input from Board

Aaron Powell
Vice President for UW-IT and CIO

Jacob Morris
Solutions Architect, Strategic Initiatives and Projects, UW-IT
COVID-19 Impacts
Impacts on IT for Teaching and Learning

Erik Hofer
Associate Vice President for Academic Services, UW-IT
Key issues

> Operational impacts

> Some wins
  – Teaching Remotely (teachingremotely.washington.edu)
  – JupyterHub pilot
  – Enhancements to retention support tools

> Access issues related to remote learning

> Community focus on vendor press/behavior

> Dynamic market activity in the T&L tools space
QUESTIONS
UW Finance Transformation

Ed Loftus
Assistant Vice President for Finance Transformation
Architect: Most Deliverables Achieved

- FDM Blueprint 3.0 secured unanimous approval
- Initial configuration of Workday Financials now built
- Systems dispositioning sessions nearly complete
- Data Conversion Integrity Plan complete
- Initial gap app decisions made
- Detailed review of impacts to HRP substantively complete
- Reporting Strategy complete
- Data Management Guardrails complete
Architect by the Numbers...

Processes Designed
30 Processes Defined
340 Hrs of discussion
70 PTT members involved

>1000 User Stories defined

System Dispositioning:
968 systems*
dispositioned
(22 outstanding)
379 Retain / 395 Retire

5 Universities interviewed for
Shared Services benchmarking

113 Cross-Functional
Design Sessions

Engaging our stakeholders:
42 communications published
316 unique engagement events

24 PDW Workshops
8000+ Zoom Hrs
3000+ attendees

25 FDM design sessions w/125
attendees

Assessing the change:
Captured 343 change impacts!

*968 systems were identified in the data gathering efforts in total, though more than 100 of those were systems that are not directly related or integrated with the finance or supply chain system, and approximately 70 were duplicates.
Current Key Program Risks

> Major elements of the core program have remained on scope, schedule and under budget

> Some components are behind schedule and are in “red.” These include an integrated plan, technical infrastructure and reporting

> The overall program is currently yellow, both from an internal reporting status as well as with our external partners
Formal Transition to Configure & Prototype Moved to November

- Transition is contingent upon the finalization of a detailed integrated plan
- The core program team is dedicated to supporting this plan development while also identifying ways to advance in the most important areas and focus on work that identifies as critical path and critical for go-live (CFGL) items
Initial Stage Timeline

**OP MODEL:** DEVELOP ROLES, PROFILES, INVENTORY SELF-SERVICE CASE REQ, AND SERVICE DELIVERY APPROACH
(Throughout Stage)

**TRAINING STRATEGY**
(Oct-Feb)

**CONFIRMATION SESSIONS**
(November)

**INTEGRATIONS AND GAP APPLICATIONS DESIGN AND BUILD**
(Throughout Stage)

**FINALIZE REPORTING STRATEGY; REPORTS DESIGN & BUILD**
(Throughout Stage)

**CONFIGURE & PROTOTYPE 1.5 TENANT BUILD**
(Feb/March)

**TESTING STRATEGY & PREP**
(March-June)

JUNE 2021

OCT 2020

SPRINT 1 NOV/DEC

SPRINT 2 JAN/FEB

SPRINT 3 FEB/APRIL

SPRINT 4 MAR/MAY

SPRINT 5 APR/JUNE
To ensure program success, a “Get2Green” process was implemented to allow close tracking for any workstream(s) / partner organization currently in a yellow or red status by providing visibility to enable active support.

- ITF, UWM, Integrations, ORIS, UW Finance submitted GTG plans.
- S6 (group of six sponsors) is monitoring activities to ensure program-wide completion of deliverables.
For discussion: The details of the operating model and business processes are of interest, particularly the impacts of both on the campus.
QUESTIONS
Top 1 – 2 IT Issues Discussion

Jacob Morris
Solutions Architect, Strategic Initiatives and Projects, UW-IT
QUESTIONS AND DISCUSSION