## UW FT Combined Program

### Executive Summary - 9/30/2021

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### Departmental Systems Remediation (Campuses, Schools, Colleges, Departments, Auxiliaries)

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### Notes:

(A) Program schedule and budget extensions were approved by the Board of Regents in September, 2021. The total cost and budget for the project include the initial Readiness project ($23M). Also included in the central budget are Contingency, Reserves and Executive Director funds; and underspending within sub-projects will be moved to Reserves in the central budget on a monthly basis.

(B) Total Budget allocation to sub-projects will not be shown going forward, since they vary month-to-month, due to central budget management practices.

9 separate projects under one Combined Program, plus 2 areas of work across the campus.
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### Overall Program Status:

The program remains in YELLOW status. The recruitment and retention of resources remains an issue. We are utilizing contractors as an interim solution but this will have a negative impact on the program budget long-term. We are actively working other issues and prioritizing them based on their impacts across the program. The collection of the open design decisions is providing valuable transparency and supporting our prioritization efforts.

**Updated 10/01/21, by Chris Mercer**

### Notes:

(A) Program schedule and budget extensions were approved by the Board of Regents in September, 2021. The total cost and budget for the project include the initial Readiness project ($23M). Also included in the central budget are Contingency, Reserves and Executive Director funds; and underspending within sub-projects will be moved to Reserves in the central budget on a monthly basis.
## Functional

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**OVERALL STATUS:** The UWFT Functional pillar is in yellow status due to a significant number of vacancies within the team. While the team is understaffed, they continue to make good progress for Sprint 4 of unit testing and other planned activities. There is also a stronger level of collaboration happening across the teams within the program which benefits our ability to ensure design activities are completed in time for end to end testing.

**Major Accomplishments:**
- Completed Tenant 2.0 Build and Data Validation
- Developed dashboard for open design decisions for transparency across the program
- Presented overviews of end to end processes in support of Operating Model/Support Model

**Key Upcoming Milestones:**
- Complete work on traceability of requirements of all unit testing activities
- Complete Sprint 4 unit testing
- Provide functional design support for Systems Design Support (SDS) working groups
- Complete Program Test Plan

**Staffing Resources:**
- Continue to recruit for functional team vacancies
- Assessing current structure of functional team to identify areas of opportunity to leverage key skills and knowledge

**Issues and Risks:**
- Recruitment of qualified candidates is an exceptional challenge at this time. Contract resources are being used as a stop gap continue the momentum of work (at increased cost)
- Beginning balance conversion will continue to be a significant effort

*Paula Ross, 10/6/21*

**Notes:**

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## Technical

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**OVERALL STATUS:** The technical team has 13 workstreams including data platform (2), reporting, gap applications, remediating HR/P Workday, Finance Data Repository (FDR), Remediations of UW-IT systems, Retirement of systems, Student Database (SDB), Identity and Access Management, Service Management, Data Conversions and Campus Outreach. The teams are making great progress in getting data from Workday out to other systems through the Enterprise Data Platform - many areas are working on the 4th release. We continue to complete gap applications, modify ServiceNow to support the operating model, remediation of SDB, converting data for the next tenant, and developing a joint data repository for Academy and UWM customers. We are halfway through the Systems Design Support (SDS) program to assist systems remediations and the eFECS RFI is nearing completion.

**Major Accomplishments:**
- Config tenant 2.0 completed
- Data necessary for the first phase of the FDR was provided from the data platform
- Enterprise data platform release 3 completed
- SDS Group 1 systems completed
- Staffing adjustments completed to meet new budget restrictions

**Key Upcoming Milestones:**
- Roll-out of tenant 3.0
- eFECS RFI completion with possibly RFP
- Release 4 from Enterprise Data Platform
- Hire critical resources for development and project management

**Staffing Resources:**
- Positions posted and interviewing for test lead, QA, SQL developers, BA's, PM's
- Working across program pillars to share candidates and best practices in recruiting processes

**Issues and Risks:**
- Campus units may not have the budget or resources necessary to complete remediations. As SDS completes for each group we are tracking deliverables and working with units to determine if they need help adjusting priorities, resources, additional information, etc.
- eFECS may proceed to an RFP process which could delay our timeline. Working with MAA to move through each step as quickly as possible. Tech teams are working to streamline the system and make any transition or remediation faster and easier.
- Solution for cross-era reporting has not been completed which impacts the conversion, reporting, and remediation teams across enterprise systems teams.
- Institutional Org Structure and Finorg hierarchy replacement work is moving very slow due to lack of information for customers. Teams are working to deliver necessary information to enable units to select or build a hierarchy.

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*Gail Rogers, 10-01-21*

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**OVERALL STATUS:** OCM is on track with most tasks except change impacts due to Design being behind. We continue to address our open positions and just confirmed a resource for one of the open training developer roles. Unit outreach and engagement continues and we’re currently working on the identification of unit Change agents.

**Major Accomplishments:**
- Conducted inaugural *UWFT Roadshow* which hit capacity registration
- Finalized *Audience Analysis* findings and readout deck
- Hosted successful *Workday "Core Concepts" sessions* focused on FDM

**Key Upcoming Milestones:**
- Finalize *Shared Environment Curriculum*
- Finalize *Change Agent* identification for UWA and conduct launch session
- Launch *Change Readiness Assessment Survey*
- Begin *Workday Curriculum* design build and review sessions

**Staffing Resources:**
- Have filled one Training Designer role - starts October 11th.
- OCM is currently recruiting (and behind) for 1 Training Designer, 1 Change Manager and 1 Comms Specialist.

**Issues and Risks:**
- **RISK:** Process & System Design is not complete, it is impacting our ability to finalize change impacts. We will have to wait until January to finalize change impacts which could impact curriculum design.
- **RISK:** Challenges to staffing may impact OCM’s ability to deliver some work, especially around Training design and communications.

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**Jeff Bishop, September 28, 2021**

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**Overall Status:** The PMO has developed a standard project planning template in Smartsheet and a methodology to consolidate the disparate plans into one, comprehensive integrated plan. A Decision Management process has been instituted and a Change Control Process including a Change Control Board has been established.

**Major Accomplishments:**
- Developed and launched a Program Dashboard and individual Pillar dashboards to help facilitate transparency and management of the program.
- Developed various reports to help manage the critical path: 30-day Urgent Tasks, Overdue Tasks, Consolidated Plan, 30 60 90 day lookahead.
- Proposed and developed a resource pool to help mitigate risks in staffing for PM and BA resources
- Completed analysis and drafted Cross Era Reporting proposal

**Key Upcoming Milestones:**
- Implementation of Control Center to manage the program's use of Smartsheets
- Transition of Testing from Functional Pillar to EPMO

**Staffing Resources:**
- EPMO is experiencing challenges in staffing due to employees on leave, attrition, and long lead times for hiring.

**Issues and Risks:**
- Demand for PM resources continues to grow

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**OVERALL STATUS:** The UWFT UW Medicine Program (UWM) has reduced overall risk and health from Red to Amber status. This trend should continue as UWM is working diligently to meet all requested commitments as well as Medicine led activities required to implementation success. UWM is making good progress on high priority items, but staffing still continues to be a top concern.

**Major Accomplishments:**
- Intra-Medicine reporting criteria established.
- UWM delivered the first batch of Harborview Medical Center grants data to the UWFT Data Conversion team on 8/13.
- Worked with the ePMO and Budget team to align on UWM resource forecast.
- Several sessions have contributed to progress for Supplier Harmonization, an important body of work to determine the single list of Suppliers to load into Workday. Differences between UW Academy and UW Medicine business practices and current state systems make this a complicated effort requiring collaboration at many levels.
- Our Design team is excited as we implement our Business Analyst (BA) Support model and are staffing to cover all E2E process areas. Our new BAs have completed as-is workflows for 3 areas and are working on flows for 4 others.

**Key Upcoming Milestones:**
- We are starting the process to use the as-is flows to define a full list of Medicine requirements, complete a gap analysis of existing requirements, and submit new “raw requirements”. This gets us closer to our goal of an initial list of Medicine requirements by the end of year and to have a base as-is information to support design and Org Change Management (OCM) activities.

**Staffing Resources:**
- Onboarded a number of resources in this period, but acceleration of planned resources is needed to meet timelines.
- Hiring of limited term employees continues to be extremely challenging in this marketplace.
- Identifying and interviewing potential resources is putting strain on additional staff, but confirmed national recruiting ability with UWM leadership to boost qualified applicants.

**Issues and Risks:**
- Inability to fill limited-term FTE roles with qualified candidates in the timeframe needed. Contractors may need to be hired to move work forward while we continue to look for qualified FTEs (at some increased cost).
- Lack of integrated plan with dependencies and critical path makes it difficult to plan/forecast deliverables, workloads, and resource allocation.
- FDR alignment has transitioned from Issue to Risk.
- Open issues are being managed. However some risks and delayed decisions may increase this rating. (cross era reporting, customer support alignment, locations, etc.)

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# Research Administration

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**OVERALL STATUS:** Risks/Issues still persist. Research has been able to hire/backfill for critical resource departures (onboarding in progress). Critical blocking issue around grant approval routing being escalated to sponsors.

We have identified the following critical assumptions and dependencies and are monitoring and mitigating those along with risks and issues:

- Financial Data Model (FDM) & data mappings 100% completed in order to finish development by end of Design Sprint 5
- Financial Data Repository (FDR) - Grants data completed in order to finish development by end-to-end testing
- Fin Org Replacement Solution (Subtype in WD vs IOS alternate hierarchies) completed by WD and ASTRA by Feb 2022 - Critical Blocking Issue
- GA2C Business Process redesign finalized decisions by end of Design Sprint 5
- End-to-End (E2E) development & Timeline

*Note:* some key dependencies for ongoing success in research administration continue to be deferred because of UWFT work (e.g. Compliance Systems Integration & Unique Researcher ID (ORCID))

**Major Accomplishments:**

- Reviewed and provided feedback for End to End Testing Plan and Cross Era Reporting
- Released Advanced Budget Maintenance work to Production
- Consolidated Schedule with Automation

**Key Upcoming Milestones:**

- Research Integration Platform (RIP): Infrastructure build out
- SAGE: Award Set up development
- Project Management: Working to create integrated schedule with dependencies

**Staffing Resources:**

- Unexpected resource departures have decreased working capacity - contractors onboarding for short term and continue to recruit long term hires

**Issues and Risks** (some issues and risks show improvements over the past quarter):

- Grant Approval Process is blocked do to no decision regarding design and ability to add in Division and Sub-Division approvals and subtype vs IOS alternate hierarchies
- Critical decisions on system dispositions, business processes determination, and where work will occur outstanding - Progressing-
- ORIS operational needs and requirements continue to exist
- Overlapping scheduling and divergent work requests continue
- FDM data not scheduled to be 100% until July 2022 - this brings significant risk to Research Development risk

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(B) Total budget allocation to sub-projects will not be shown going forward, since they vary month-to-month, due to central budget management practices.

Ryan Green, Sept. 30, 2021
OVERALL STATUS: FRP currently consists of four major workstreams that include Technical readiness, Operational readiness, Communications, and our PMO. All of our workstreams are on track with work progressing and dashboards/reports have been developed in collaboration with the EPMO to help track and monitor the work. With the official approval from Board of Regents, FRP is back on schedule to complete by 2023, there is currently a significant risk to the program as a whole for staffing and FRP is impacted by this. FRP leadership just conducted a risk identification activity. The 30+ potential FRP risks that could impact UWFT are being described, categorized, prioritized, triaged, assigned and, based on that, will be logged into UWFT Jira RAID if appropriate.

Major Accomplishments:
• 15 Quality gates were submitted and completed with an 75% success rate!
• Systems Design Support (SDS) Group 1 submissions from FRP – had a high # of systems completed (20 of 24)
• Framework for tools, processes, and application development for program were implemented
• Completed Bodies of Work for integrated plan in collaboration with EPMO and other pillars
• Kicked off 3 End-to-end testing (E2E) project teams, 2 scheduled upcoming

Key Upcoming Milestones:
• Quality gate 3 deliverables
• Hire and onboard resources required to execute the FRP projects, specifically project managers and developers
• SDS session collaboration with design team and completion of requirements

Staffing Resources:
• Staffing is a huge concern for FRP due to the fact that the team is down 3/5 of the project managers and developer resources could potentially be seriously impacted due to state-mandated vaccination requirements.
• All open positions have all been drafted and posted. FRP is actively recruiting to fill all roles and working diligently with vendors to recruit potential contract to hires.

Issues and Risks:
• E2E systems required from FRP need to be realized by 10/31/2021 for FRP to be successful
• Level of resources required to support remediation and retirement of 162 UW Finance systems is higher than available funding
• Umbers still remains blocked and presents a schedule issue for FRP

Notes:
(B) Total Budget allocation to sub-projects will not be shown going forward, since they vary month-to-month, due to central budget management practices.
## Integrated Service Center

<table>
<thead>
<tr>
<th>Project</th>
<th>Leader</th>
<th>Program Area</th>
<th>Overall Risk &amp; Project Health *</th>
<th>Budget Rating</th>
<th>Schedule Rating</th>
<th>Scope Rating</th>
<th>Resource Rating</th>
<th>Issues Rating</th>
<th>Actual Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrated Service Center</td>
<td>Greg Koester</td>
<td>Enterprise Systems</td>
<td>12</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>$77,570</td>
</tr>
</tbody>
</table>

**OVERALL STATUS:** Although approval to move forward on requested resourcing, the ISC is yellow primarily due to inability to plan and resource for the FT work and impacts.

**Major Accomplishments:**
- Developed timeline for identifying/developing HRP Reports requiring remediation
- Developed UWFT ISC work breakdown structure (WBS)

**Key Upcoming Milestones:**
- Continue to work with program teams to coordinate and integrate all pillar program project plans.

**Staffing Resources:**
- The ISC is in yellow mainly due to resource issues and unplanned work. The ISC has recently lost several key operational resources and has not yet hired all FT resources. Both are putting a strain on ISC capacity. Additionally, we continue to receive mandatory non-UWFT related work requests such as House Bill 2669, new optional Long-Term Disability plans, and the PEBB/SEBB dual enrollment work. We also continue to receive new vaccine attestation requirements on a weekly basis. We are working to hire and onboard new resources as quickly as possible.

**Issues and Risks:**
- All issues are related to staffing resource notes.

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**Notes:**

(B) Total budget allocation to sub-projects will not be shown going forward, since they vary month-to-month, due to central budget management practices.
## UW-IT

<table>
<thead>
<tr>
<th>Project</th>
<th>Leader</th>
<th>Program Area</th>
<th>Overall Risk &amp; Project Health *</th>
<th>Budget Rating</th>
<th>Schedule Rating</th>
<th>Scope Rating</th>
<th>Resource Rating</th>
<th>Issues Rating</th>
<th>Actual Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>UW-IT</td>
<td>Rob McDade</td>
<td>Enterprise Systems</td>
<td>12</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>$3,574,804</td>
</tr>
</tbody>
</table>

**OVERALL STATUS:** Steady work and progress continue. Known challenges are being handled / mitigated. Continued focus and progress on upstream dependencies is encouraging, and should begin to trickle down into the technical work soon, reducing the overall level of uncertainty in various areas. Biggest areas of concern with respect to possible net-new requirements continue to be Cross-Era Reporting and the Operations / Support Models. We continue to be lean on resources, but stabilizing and working to fill openings in priority order.

**Major Accomplishments:**
- Integrations team delivered on both Quality Gate goals with a big effort to beat the deadline despite vacations disrupting team throughput
- EDW's new Operational Data Store (UWODS) release 3 delivered
- Presented and helped host Workday Technical Conference in July
- Successfully recruited and onboarded two Full Stack developers
- eFECS RFI released and responses gathered

**Key Upcoming Milestones:**
- EDW's new Operational Data Store (UWODS) release 4
- eFECS disposition & next steps determination
- Finance Web Service Evaluation Release 4

**Staffing Resources:**
- Key developer resources hired, Integrations PM in process, backfills for departed staff in process as well
- Staff turnover creating additional hiring risks and loss of subject matter expertise

**Issues and Risks:**
- Dependencies on FT decisions are progressing, but slowly, and often have cascading impacts as work to re-assess impacts consumes cycles planned for other work
- Operating Model for FT has not yet been determined / communicated and this will impact several technical services.
- In areas where transformation and increased institutional maturity is required, ownership of solutions and responsibility for decision making is not clear (e.g. who owns enforcing "consistency of reporting across the organization", which is one of the intended goals of implementing the Financial Data Repository (FDR) project).
- Staff turnover is compounding risks

Rob McDade - 30-SEP-2021

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**Notes:**

(B) Total Budget allocation to sub-projects will not be shown going forward, since they vary month-to-month, due to central budget management practices.
OVERALL STATUS: The Systems Design Support (SDS) program has completed all sessions for Group 1 systems and has begun sessions for Group 2. Ongoing concurrent sessions have been held with systems requiring special support (e.g., ESO, Aim, EPIC). As sessions complete, units are responsible for dispositioning systems and planning/remediations for their systems. The Technical Change Management (TCM) team has a tracking portal to understand the progress being made by the units. Some systems are struggling to complete the initial planning deliverables and the TCM team is reaching out to help. The TCM team is also helping connect units to the Enterprise Data Platform (EDP), Testing, and other resources.

Major Accomplishments:
• Completed all SDS sessions with Group 1 systems.
• Tracking and reporting on the progress for all unit remediations.
• Group 2 system sessions kicked off and ongoing sessions are being held with special support systems.

Key Upcoming Milestones:
• Complete Group 2 and special systems.
• Completion of all system planning deliverables so that the program has estimated completion dates

Issues and Risks:
• Some units have missed some deadlines to complete planning deliverables. The SDS team is working to identify the reasons and provide assistance where necessary.
• Some units may require additional funding for resources and the team will help provide them with the information they need to build accurate estimates for the work.
• Some estimates exceed the start of End to End testing and the team is working to understand how much of End to End testing is necessary for those systems. It may be possible to enable integration testing to thoroughly test without those systems needing to complete End to End testing with Workday.

Gail Rogers, 10-01-21
**Oversight Level Key**

1. Overseen by UW management and staff. Requires OCIO approval and reporting if over delegated authority.

2. OCIO approval required and regular project reporting. Quality Assurance (QA) reporting required, maybe internal or external. OCIO may recommend project to be full Technology Services Board (TSB) oversight.

3. High severity and/or high risk, subject to full TSB oversight, which includes TSB approval, written reports to the TSB, periodic status reports to the TSB by the agency director and staff, and submission of other reports as directed by the TSB. External QA reporting required.

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**Project Health Key**

- **Project is on time, on budget, and within defined scope, with minimal issues.**
  - Overall Risk Rating where 5-10 is Green

- **Changes to scope, budget, or resources have placed project at some risk. Project has the potential for delays, cost or scope changes.**
  - Overall Risk Rating where 11-17 is Yellow

- **Major changes to scope, budget or resources have placed project at critical risk. One or more of the following must change in order to proceed: project schedule, resources, budget, scope.**
  - Overall Risk Rating where 18-25 is Red

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

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***** IT Project Risk Ratings (summed to calculate Overall Health Rating)***

**Current Risk Rating**

<table>
<thead>
<tr>
<th>Budget, Schedule, Scope</th>
<th>Use the scales below to rate current performance on Schedule, Scope and Budget (select appropriate number for each)...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Performing better than project plan; ahead by 5% or more (for Schedule and Scope only)</td>
</tr>
<tr>
<td>2</td>
<td>Performance is on plan</td>
</tr>
<tr>
<td>3</td>
<td>Behind plan, but within 5% of original targets. For Budget: over or under spending, but within 5% of plan.</td>
</tr>
<tr>
<td>4</td>
<td>Behind plan between 6% to 10% and likely to use/using contingency. For Budget: over or under spending by 6-10%, and likely to use or using contingency.</td>
</tr>
<tr>
<td>5</td>
<td>Greater than 10% behind plan. For Budget: over or under spending by &gt; 10%, and more than half of full FT Program contingency is projected to be used.</td>
</tr>
</tbody>
</table>

**Current Risk Rating**

<table>
<thead>
<tr>
<th>Resources</th>
<th>Use the scale below to rate current performance on Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>in place, or high likelihood of being available as specified in the Resourcing Plan.</td>
</tr>
<tr>
<td>2</td>
<td>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.</td>
</tr>
<tr>
<td>3</td>
<td>somewhat in place, or struggling to perform, with moderate risk to schedule, budget or deliverables.</td>
</tr>
<tr>
<td>4</td>
<td>There are gaps in resourcing, with moderately high risk to schedule, budget or deliverables. Mitigation plans in place, or will be soon.</td>
</tr>
<tr>
<td>5</td>
<td>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.</td>
</tr>
</tbody>
</table>

**Current Risk Rating**

<table>
<thead>
<tr>
<th>Issues, Risks, Project Dependencies</th>
<th>Use the scale below to rate current impact of Issues and other factors relevant to the project (select one number for this measure)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>No risks or issues identified at this time</td>
</tr>
<tr>
<td>2</td>
<td>Some identified but minor, no impacts anticipated</td>
</tr>
<tr>
<td>3</td>
<td>Some that could impact the project are being managed, with minimal impact anticipated</td>
</tr>
<tr>
<td>4</td>
<td>Significant risks/issues/other factors identified but not yet managed</td>
</tr>
<tr>
<td>5</td>
<td>Risks/issues being managed but will have significant impact (greater than 10%) on project budget, schedule and/or scope</td>
</tr>
</tbody>
</table>