UW Enterprise IT Projects

Project Portfolio Executive Summary - Sep 30, 2019

Project	Sponsor	Oversight Level *	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
Destination: One	Tim Dellit	3 - UW	Yellow ↓ (A)	Green	Green	Green	Green	Yellow ↓	$44,137,507	$159,500,000
Finance Transformation Readiness	Mark Richards	3 - OCIO	Yellow ↓ (B)	Green	Green	Yellow ↓	Yellow	Yellow	$19,800,000	$25,500,000
Advancement CRM Replacement	Julie Brown Dan Peterson	3 - OCIO	Yellow ↓ (C)	Green	Yellow ↓	Green	Green	Green	$821,474	$4,000,000
Clinical Trials Management System	John Slattery	2 - UW	Green	Green	Green	Green	Green	Green	$8,461,314	$15,703,970
Northwest Hospital HR & Labor Integration	Nicki McCraw	2 - UW	Green ↑ (D)	Green	Green	Green	Green	Green ↑	$7,741,000	$14,974,000
Pharmacy Inventory Management System	Shabir Somani	2 - UW	Yellow (E)	Green	Green ↑	Yellow ↓	Green ↑	Yellow ↓	$14,309,224	$14,911,000
HFS Point of Sale	Pam Schreiber	2 - UW	Green ↑ (F)	Green	Green	Green	Green ↑	Green ↑	$310,000	$900,000
F&A Space	Sue Camber	2 - UW	Yellow ↓ (G)	Yellow ↓	Yellow ↓	Green ↓	Yellow ↓	Green ↓	$0	$246,000
Transportation System Improvement Project	John Chapman	1 - UW	Green	Green	Green	Green	Green	Green	$3,144,384	$3,344,000
Finance E-Commerce/Touchnet	Brian McCartan	1 - UW	Green *new*	Green	Green	Green	Green	Green	$0	$1,000,000
ICA Group Sales	Erik Jones	1 - UW	Green ↑	Green ↑	Green ↑	Green ↑	Green	Green ↓	$0	$500

Notes:

(A) Issues risk elevated due to 2 of 19 workstreams not completing build by tartget test date; EPIC workflow and functionality changes challenging

(B) UWFT working towards December Regents meeting; combined risk ratings for Scope, Resource and Issues may impact completion of Design phase

(C) Schedule risk increased; work continues with UW-IT around integrations scoping, requirements, and resource availability

(D) Overall project health is green with reduction in issues risks. 100 day go-live readiness completed

(E) Successfully implemented Elite inventory management system at HMC in September. Project is closing out. Some issues to resolve for negotiating long term contract

(F) Overall project health is green with reduction in resource and issues ratings due to good progress on installing new POS devices

(G) New reporting, project start delay in hiring project manager; uncertainty around potential use of existing solution at Capital/Space Mgt puts health at yellow

(over for Program Operations impacts)

↑ Improvement over previous quarter   ↓ Setback from previous quarter

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Program Operations	Executive Leadership	Major Projects Interdependencies Assessment		*Note: ISC and UW-IT resources are tracked within the major projects' budgets*
Integrated Service Center	Ann Anderson	UW Enterprise	🟢	Northwest Hospitals is going well from ISC perspective and is widely covered in terms of updates. Status is Green for Workday, we are working through the handoff of communications with employees to ensure it is smooth come Jan 2, 2020. For future system changes, like those required for the Postdocs labor contract, the appropriate time to efficiently and accurately implement changes into an integrated system should be included into the strategic planning and effective date or we risk losing our talented people resources.
UW-IT	Aaron Powell	UW Enterprise	🟡	Requirements for Advancement CRM project remain undefined in some areas and impact on UW-IT resources remains unclear. Risk is that UW-IT staff will not be available when Advancement needs them. Also, with EIP and Workday now in place, pulling HR data from EDW is no longer an appropriate integration pattern. UWFT consuming significantly more resources for cost estimation and scoping than expected. Risk is impact to operations and staff burn-out. Northwest Hospital going well: well-resourced and executing according to plan.

* 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.

* Project Health Key	
🟢	Project is on time, on budget, and within defined scope, with minimal issues. **Overall Risk Rating of 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 of 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 of 18-25 is Red**

Destination: One

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
Destination: One	Tim Dellit	**3 - UW**	11	2	2	2	2	3	$44,137,507	$159,500,000

Project Status: Project leadership was strengthened on September 9 when Doug Blair and Dr. Sundeep Desai joined the Destination: One Program as Program Director and Physician Program Director, respectively. Each brings extensive experience across multiple Epic implementations and both are working to quickly acclimate to the organization and positively impact the project.

Project Management rigor has been enhanced through a more detailed bottom up planning and status reporting approach. Program leadership is now in incorporating this bottom up information into budget reconciliation and reporting.

October is a critical month. System build and configuration are in full swing with substantial completion scheduled for the test start date of Nov 8. Issues rating for this quarter have been downgraded from a 2 to a 3 due to two of the 19 workstreams reporting elevated risk of not completing their build by the target test start date. Cardiology (Cupid) and Anesthesia are two areas where the workflow and functionality changes offered with Epic as compared to the legacy systems has been especially challenging. The criticality of the specific challenges has been shared with the Chief Health Systems office and the D:1 teams are working closely with the clinical areas to close the requirements gap to allow for completion of the build. The outstanding issues are being managed with minimal impact anticipated.

As the build phase is coming to a close, Laura Poor, the Testing Manager and Program Leadership are refining the sequencing and timing of each testing event (Functional Testing, Integrated Testing, etc.) and are focused on laying the foundation for a successful Testing phase. Further planning activities include re-assessing the training workstream and overlaying the Legacy Data Management/Conversions within the D:1 plan.

High Level Timeline:
 - Groundwork Phase - Oct-Nov'18 - COMPLETE
 - Discovery Phase - Dec'18-Jan'19 - COMPLETE
 - Adoption Phase - Jan-Oct'19 - ONGOING
 - Testing Phase - Nov'19-Jun'20
 - Training & Go-Live Phase - Jun-Oct'20
 - Post-Live & Stabilization Phase - Oct-Jul'21
Actual costs are through August 31.

per Rich Selenis 10/11/19

Notes:

(A)	Issues risk elevated due to 2 of 19 workstreams not completing build by tartget test date; EPIC workflow and functionality changes challenging

Finance Transformation Readiness

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
Finance Transformation Readiness	Mark Richards	3 - OCIO	12	1	2	3	3	3	$19,800,000	$25,500,000

Summary – The top priority for the Program team for the Design phase is the completion of the BOR materials including delineated scope, schedule and budget. Team Leadership is working with key stakeholders and our Deloitte partners on developing resource estimates for the Implementation and Stabilization phases.

Main accomplishments of 3rd quarter 2019:
•   Started Design Phase of UW Finance Transformation
•   Board of Regents December 2019 presentation drafted including Program Baseline Report Program Management Plan, Program Budget, Costing Allocation Plan and Funding Plan
•   Formal Program Scope Document and supporting assumptions developed and shared for further refinement.
•   Conducted Business Process Prototype sessions in Workday AMU tenant for business partners in UW Academy and UW Medicine
•   Created initial drafts for refinement with IT Stakeholder of IT guardrails and strategies for Data Integrations, Information Delivery, System Remediation/Retirement, Security, Data Transformation and ERP Master & Reference Data
•   Conceptual Operating Model V2 with directional support for regional shared services completed and identified top initiatives for Op Model Phase 1

Risks/Issues:
•   Timing for setting up program infrastructure may impact productivity as we move into Implementation. We are working with Deloitte on Program Management Plan and added a Deloitte Senior PM to the team.
•   If program resources aren't hired according to plan, we may not be able to meet all Program deliverables. Formal vendor and talent management strategies developed. Streamlining recruitment and onboarding process developed.

per Ed Loftus (Jeannette Lasseter) 10/11/19

UW-IT Revision	*SCOPE*	Scope rating raised from 1 to 3 ("behind plan, but within 5% of targets").
	Comment:	*Based on Project QA September report: "progress getting ready for implementaiton significatntly lagging; lacks many details."*

Notes:

(B) UWFT working towards December Regents meeting; combined risk ratings for Scope, Resource and Issues may impact completion of Design phase

Advancement CRM Replacement

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
Advancement CRM Replacement	Julie Brown Dan Peterson	3 - OCIO	11	2	3	2	2	2	$821,474	$4,000,000

Overall Status:
-Get to green plan (ETA: 11/15/19): Complete development/configuration for Phase 1, Phase 2 (Sprint 4, 5, & 6)
-Master Services and Support Agreement (MSSA) has been signed by both parties. (This moves scope from yellow to green.)

Schedule
 -Advancement is continuing to partner with UW-IT to lock down on scope for multi-factor authentication, document management system, and web services and APIs in order to build out schedule.

Scope
-Discovered that Microsoft released a user interface option called Unified Interface and we determined to move forward with this solution. Minimal customizations will be tacked on as needed.
-Completed requirements for gifts with more data and reviewed with Gift Services (Sprint 6).
-Completed draft of requirements for spousal relationship and began review with SMEs (Sprint 7).
-Completed requirements on multi-factor authentication (MFA). Continuing to partner with UW-IT MFA team to review scope and build out timeline.
-Completed requirements for document management system. Continuing to partner with UW-IT Enterprise Document Management (EDM) team to review scope and determine if feasibility of their in-house solution.
-Change management readiness interviews completed with Steering Committee members.

Resources
-Quality Assurance Test Analyst position is filled. Onboarding is in progress.

Issues
-Microsoft Talking Points feature is a possible cause that's preventing the vendor from upgrading the latest Dynamics solution. Microsoft, UW-IT, xRM, and Advancement are actively working on closing this issue. This issue was first reported by xRM on 9/23/19.

Per Julie Ngo 10/03/2019

Notes:

(C) Schedule risk increased; work continues with UW-IT around integrations scoping, requirements, and resource availability

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
Clinical Trials Management System	John Slattery	2 - UW	10	2	2	2	2	2	$8,461,314	$15,703,970

Project Status:
- Target 3 detailed design has officially kicked off in September 2019.
  - o More than 75 staff from across the three institutions and study teams attended a kickoff event on September 25 hosted by Executive Sponsors to review project goals, governance and timeline
  - o 10 working groups comprising staff from the 3 institutions are working through design.
  - o Three study team "Design & Adoption Advisory groups" have been convened for study team inputs
  - o A detailed supplement to the project charter that defines Target 3 is currently under review by the ESC
- CTMS Program Director has started in August 2019 (Fred Hutch employee).
- Executive sponsors have extended the existing MOA until October 2019
- Executive sponsors are revising the overarching Memorandum of Agreement between the Fred Hutch, the SCCA, and UW – timeline for this effort is under review
- Upcoming milestones
  - o Targeting design complete by March 1, 2020
  - o Currently managing resource risk: Hiring for project team for Target 3 is proceeding slower than planned with light pipeline for two lead roles. Team is exploring alternative resourcing models.

Note: Actual project costs previously reported included CTMS Operational costs for FY19.   Those costs have been transferred out of the project so amount shown this period more accurately reflects actual project costs.

per Rich Selenis 10/11/19

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
Northwest Hospital HR & Labor Integration	Nicki McCraw	2 - UW	10	2	2	2	2	2	$7,741,000	$14,974,000

Status: All HR & Labor project work streams are moving forward according to plan. We've completed the 100-day go-live readiness assessment at the end of September with all but a few of the operational and departmental assessment areas indicating they are where they expected to be 100 days prior to go-live. Plans are in place to get caught up in the handful of areas indicating they were slightly behind.

Technical Update:
We're in project phase 5, Testing and Training. This phase spans prototypes four through six in the Workday environment and includes the data conversion and validation and multiple rounds of testing activities. A focus for the next quarter is the deployment of benefits early enrollment, so much of the work over these past few months has involved refining requirements, testing, and preparing for this effort. Testing activities have been tied back to business requirements to ensure requirements were implemented correctly and are functioning properly.

Change Management and Training:
The registration set-up for training and the benefits orientations sessions has been established. The change management toolkit continues to be updated to support managers as they communicate with their staff with the transition. Key decisions have been finalized which allow us to notify staff of important communications related to position mapping, benefits, and training over the course of the next quarter.

Benefits Pre-Enrollment:
The prototype and solution is configured and undergoing testing as we prepare to offer early benefit enrollment to NWH and UPW staff in November. Physicians/APPs that will be transitioning to UW benefits will be included in the population to be allowed to participate in early enrollment. Benefits orientation sessions will be available via in-person sessions, live stream of in-person sessions and recorded session that can be watched at any time.

Functional Work:
The transition to the UW workweek was completed in July. Work to migrate contracts and compare policies continues with 80% of the HR policies dispositioned at the end of September. NWH/UWP and transition bargaining with the various labor unions has completed. NWH Position mapping was finalized at the end of September and will be communicated to employees in October. Solutions to HR intranet changes continue to be discussed.

Cutover:
The Kronos clock replacement cutover has been completed. The benefits early enrollment cutover plan has been established and has begun to be executed. We're continuing to put together the details of the employment cutover plan.

Testing:
Several rounds of testing were completed this quarter: end-to-end (E2E) rounds 1 & 2, payroll parallel round 1, and benefits early enrollment round 1. Only minor configuration issues have been uncovered in the testing completed to date. E2E Round 3, payroll parallel round 2, benefits early enrollment round 2 and infrastructure testing will complete next quarter.

Project Budget:
Overall, the project is running under budget through August 2019 and is forecasted to be under budget at the end of the project.

Per Ryan Markowski 10/10/2019

Notes:

(D) Overall project health is green with reduction in issues risks. 100 day go-live readiness completed

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
Pharmacy Inventory Management System	Shabir Somani	2 - UW	11	2	2	3	1	3	$14,309,224	$14,911,000

Project Status: PIMS (Pharmacy Inventory Management System) is now live at HMC (9/8/19) and UWMC (10/21/18). The HMC go live was very smooth with no critical issues reported after go live.

Project close-out status:

Completed Activities:
- o   Lessons Learned sessions have been documented and recorded on the PIMS SharePoint site
- o   Transition to operations is complete with Don Bomgaars now responsible for operational support
- o   Transition to technical support is complete with Joe Smith now responsible for technical support
- o   The command center was closed on 9/21/19. Off hour calls are handled through the ITS Help Desk with Analysts on call
- o   Project documentation (open risks, decisions, action items) are completed

Activities in Progress:
- o   Post Implementation Review (PIR) to be completed by 10/11/19.
- o   Coordination with leadership to review status of outstanding requirements or enhancement requests in preparation for long term contact negotiations with vendor
- o   Report of functional requirements for inclusion in final contract
- o   Project Manager contract extended through 12/31/19 to manage the remaining close out activities

Actual costs are through August 31 and do not include go-live support hours. Estimate at completion for the project is $14,454,861.

Per Rich Selenis 10/9/19

UW-IT Revision	ISSUES	Issues rating raised from 2 to 3 ("behind plan, but within 5% of targets").
	Comment:	Issues remain at 3 due to need for some open deliverables to be resolved in close-out report; and for negotiations to begin to extend TECSYS contract past January end date.

Notes:

	(E) Successfully implemented Elite inventory management system at HMC in September. Project is closing out. Some issues to resolve for negotiating long term contract

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	10	2	2	2	2	2	$310,000	$900,000

Status:
Major development work is complete and register deployments have started. PCI-compliant credit card terminals and the Husky Card tender are working to requirements. The project is on track to complete deployments by mid-November, in time for the calendar year deadline.

Resource risks and Issues have reduced with the completion of system programming. Resources from the vendor are also being leveraged for deployments to supplement internal staff.

The UW Medical Center has initiated a POS replacement project using the same vendor. While HFS isn't managing their project, we are in coordination with their team to ensure there aren't conflicts with enterprise-level settings (for example, the Medical Center may implement a tender not in use in HFS, so that tender shouldn't appear in HFS reporting).

Per Ethan Owens 10/4/19

Notes:

(F) Overall project health is green with reduction in resource and issues ratings due to good progress on installing new POS devices

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**	13	3	3	2	3	2	$0	$246,000

Project Status:
RFP release has been put on hold while we explore utilizing the Space Functionalization capability of the new space database management system, InVision, currently being implemented by Capital and Space Management. If determined to be a viable solution, this approach should enable a more rapid implementation, streamline systems interfacing for end-users (surveyors), MAA and IT, and could reduce costs by eliminating the purchase of an additional software package. The draft feasibility study should be completed by the end of November 2019.

Per Colleen Bettis 9/30/2019

Notes:

(G) New reporting, project start delay in hiring project manager; uncertainty around potential use of existing solution at Capital/Space Mgt puts health at yellow

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	$3,144,384	$3,344,000

Project Status:
Permit configuration into T2 Flex system ongoing. Change order approved extending the "Go live" date from Sept. to January 15th increasing project cost by $28,000.

PaybyPhone moblie application launched on Sept. 25 in three visitor lots

The LPR vehicle equipment installations for three enforcement vehicles was completed July 12th with operations training completed on the use of the new software and hardware.

Per Eric Johnson 10/4/19

Finance E-Commerce/Touchnet										
Project	**Sponsor**	**Oversight Level***	**Overall Risk & Project Health ***	**Budget Rating**	**Schedule Rating**	**Scope Rating**	**Resource Rating**	**Issues Rating**	**Actual Cost**	**Budget**
Finance E-Commerce/Touchnet	Brian McCartan	**1 - UW**	9	2	2	2	2	1	$0	$1,000,000

Summary: Merchant Services is deploying a centralized e-commerce platform to simplify e-commerce and meet PCI compliance for University merchants.

Project Status: Contract Negotiations completed. Project starting in October.
Actual cost unknown until all labor and associated costs are calculated.
Software cost is fixed, with no expected variation.

Per Melissa Hall/Gordon Scherer 09/30/2019

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**	6	1	1	1	1	2	$0	$500

Status: we began using the system in late August for group ticket sales for all current sports and it is working fairly smoothly. Small issue with system not cutting off sales at scheduled date, but we are working with FEVO on this.

Per Bess Hampsch/ 9/25/19

* Oversight Level Key	** Project Health Key	
1. Overseen by UW management and staff. Requires OCIO approval and reporting if over delegated authority.		Project is on time, on budget, and within defined scope, with minimal issues. **Overall Risk Rating where 5-10 is Green**
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.		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**
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.		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**

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

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

Current Risk Rating	Use the scale below to rate current performance on Budget, Schedule and Scope (select appropriate number for each)
Budget Schedule Scope	1 = Performing better than project plan; ahead by 5% or more
	2 = Performance is on plan
	3 = Behind plan, but within 5% of original targets
	4 = Behind plan between 6% to 10% and likely to use/using contingency
	5 = Greater than 10% behind plan and more than half of contingency used

Current Risk Rating	Use the scale below to rate current performance on Resources
	People with the necessary expertise are....
Resources	1 = in place, or high likelihood of being available as specified in the Resourcing Plan.
	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.
	3 = somewhat in place, or struggling to perform, with moderate risk to schedule, budget or deliverables.
	4 = There are gaps in resourcing, with moderately high risk to schedule, budget or deliverables. Mitigation plans in place, or will be soon.
	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.

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