

## UW Enterprise IT Projects

### Project Portfolio Executive Summary - Sep 30, 2022

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
<b>Finance Transformation Combined Program</b>	Mark Richards, Chris Mercer	3 - OCIO	(A)						\$222,534,000	\$339,906,000
<b>Advancement CRM Replacement</b>	Julie Brown, Tamara Josserand	3 - OCIO							\$4,491,000	\$5,533,000
<b>UWM Data Analytics Warehouse</b>	Mo Broom, Richard Goss	2 - UW							\$4,600,000	\$6,200,000
<b>Electronic Document Management System Replacement</b>	Anja Canfield-Budde	2 - UW							\$1,545,000	\$3,006,000
<b>Salesforce Conversion</b>	Frank Hodge	2 - UW	(B) NEW						\$1,646,000	\$1,607,000
<b>Graduate School Admissions Modernization</b>	Joy Williamson-Lott	2 - UW							\$63,000	\$545,000
<b>UWF AiMR</b>	Tim Rhoades	1 - UW							\$211,000	\$403,000
<b>Gradescope</b>	Aaron Timss	1 - UW							\$266,000	\$267,000



**8 projects**

\$235.4M

\$357.5M

**Notes:**

- (A) 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) The Salesforce Conversion project has been underway for some time, and was not being tracked until an implementation consultant was added to the project, so is new to this report.




Program Operations	Executive Leadership	Program Area	Status	Major Projects Interdependencies Assessment	<i>Note: ISC and UW-IT resources are tracked within the major projects' budgets</i>
Integrated Service Center	Ann Anderson	Major Projects		<p><b>Overall rating:</b> Yellow</p> <p>Although the ISC has numerous open projects, the largest projects are:</p> <ul style="list-style-type: none"> <li>• <b>UW Finance Transformation</b> – FT Program work and updates for the ISC are captured in the Combined FT Report.</li> <li>• <b>HR Hierarchies</b> – As part of the UW FT Project, the UW's financial Organization Code ("Fin Org") is being retired and replaced by a Workday Custom Organization (aka Alternative Hierarchy) to capture UW-HR's institutional reporting hierarchy.</li> </ul> <p><b>Issues:</b></p> <ul style="list-style-type: none"> <li>• Our project work continues to be fluid and heavily dependent upon state statutes and regulations. Any new large project work is submitted and reviewed by the Workday Committee for prioritization and, if needed, resourcing and funding.</li> <li>• The yellow rating relates to the impacts of FIN (UW's legacy finance system) we are working through, some unknowns remain as the program continues their work and we anticipate design recommendations regarding impacts to our current configuration and processes.</li> <li>• The ISC is moving into UW-IT and planning is in process.</li> </ul>	
UW-IT	Andreas Bohman	Major Projects		<p><b>Overall rating:</b> Yellow</p> <ul style="list-style-type: none"> <li>• <b>Workday Support and Operating Model:</b> A major new focus for UW-IT is defining the future sustainment of Workday Finance (post go-live), including the transition of ISC into UW-IT. This is critical work for the University, and further increases the strain on key UW-IT resources.</li> <li>• <b>Advancement CRM:</b> A new go-live timeframe has been set as April 2023, exact date TBD. UW-IT is monitoring for impacts due to overlap with FT deployment window. All UW-IT work is on track.</li> <li>• <b>UW FT:</b> UW-IT's contributed labor to-date is \$8.5M, and continues to increase. We are closely watching for impact on operations.</li> </ul>	

## UW Enterprise IT Projects

### \* 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**

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**Finance Transformation Combined Program**

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget †
Finance Transformation Combined Program	Mark Richards, Chris Mercer		14	2	3	3	3	3	\$222,534,000	\$339,906,000
Functional	Paula Ross	Program	15	2	3	3	3	4	\$22,169,403	--
Technical	Gail Rogers	Program	16	2	4	3	2	5	\$35,184,868	--
Change Management	Jeff Bishop	Program	8	2	2	1	2	1	\$6,515,729	--
Project Management	Elise Barho	Program	10	2	3	2	1	2	\$5,853,491	--

*Enterprise Systems Remediation*

UW Medicine	Dale Matheson		16	3	4	3	3	3	\$16,783,401	--
Research Administration	Suzanne May		17	2	5	3	3	4	\$9,254,680	--
Finance Readiness Program	Jeanne Marie Isola		16	2	4	3	3	4	\$7,992,263	--
Integrated Service Center	Greg Koester		15	2	3	2	4	4	\$2,328,281	--
UW-IT	Rob McDade		16	3	3	3	3	4	\$6,027,385	--

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

Unit Readiness	Overall readiness of academic, medicine and administrative units	Y	The program created an enhanced engagement plan for the units which enables prioritization of critical issues and allocates resources across pillars to address those items. Two testing resources have been assigned to the units. The Systems Design Support (SDS) retirement sessions have also begun. Cutover resources have not been allocated for the units.
Side System Remediation	Overall status outside the Core Program and Enterprise Systems	Y	Some campus units are behind in their deliverables and escalations are proceeding to assist them as well as working with them to help determine which E2E cycle they will participate in. Few of the 30-40 inbound systems that need to integrate with Workday has engaged with the platform.

The program remains in YELLOW status. End-to-End (E2E) Cycle 3 testing kicked off on October 3rd and we are running slightly behind schedule. Our first Payroll Parallel test in also underway and is on schedule for an on-time completion. We will be executing an additional Payroll Parallel cycle once completed. We continue to see the number of systems and integrations scheduled for E2E Cycle 3 reducing as Pillars and units prioritize the completion of tier 1 systems. Work on the future state sustainment model is reaching a critical stage and is now the highest priority for the program.

Updated 10/14/22, by Christopher Mercer

Notes:

(A) 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.

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Advancement CRM Replacement										
Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
<b>Advancement CRM Replacement</b>	Julie Brown, Tamara Josserand	3 - OCIO	11	2	2	2	2	3	\$4,490,814	\$5,533,217
<p><b>Project Overview:</b>                      University Advancement must replace its two-decades-old Constituent Relationship Management (CRM) system, Advance. This old Oracle-based CRM fails to meet core and emerging user experience, business intelligence, analytics, access, security, and system integration needs for the UW. Advance will be replaced by Dynamics 365 for Sales, a CRM solution that can integrate with key UW systems (Marketo, Cvent, Tableau, Outlook, Office 365, etc), provides a unified multi-platform user experience, and that is capable of leveraging complex, extensible data structures to support more dynamic and nuanced information sharing, analysis, and constituent engagement across the enterprise.</p> <p><b>Overall Status:</b> Workstreams are continuing to make progress. Budget is approved by our chief operating and budget office. Project cosponsor transition completed in August. Since the last report, the project team filled one position.</p> <p><b>Major Accomplishments:</b></p> <ul style="list-style-type: none"> <li>• Completed Dynamics Export Service conversion to Azure Synapse in July 2022</li> <li>• Completed development of gift loading templates and demoed to stakeholders in August 2022.</li> <li>• Began End to End Gift Parallel Testing in September 2022.</li> <li>• Completed refactoring one system application to work with the new CRM in September 2022.</li> <li>• Automated the manual process to validate environment system changes in September 2022.</li> </ul> <p><b>Upcoming Milestones:</b></p> <ul style="list-style-type: none"> <li>• Resolve issues below in order for teams to move forward with work.</li> <li>• Conduct two townhalls (October 2022 and November 2022) as part of change management.</li> <li>• Complete first draft of cutover plan by December 2022.</li> </ul> <p><b>Risks &amp; Issues:</b></p> <ul style="list-style-type: none"> <li>• Issue 1 (open since mid-Sept): We have a couple of system environments that are out of sync right now, preventing the team from importing the latest code solution and data. The impact is the teams won't be able to validate/test new bug fixes nor work on improving This involves coordination effort between Advancement, UWIT, and Microsoft</li> <li>• Issue 2 (open since last week of Sept.): We have a number of tables where records of data are missing. We've attempted some manual workarounds but haven't been successful. Impact: can't complete testing and development team blocked on their application work. There is an open support ticket with Microsoft.</li> </ul>										
<p><i>per Julie Ngo on 10-06-22</i></p>										

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UWM Data Analytics Warehouse										
Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
<b>UWM Data Analytics Warehouse</b>	Mo Broom, Richard Goss	2 - UW	9	1	3	1	2	2	\$4,600,000	\$6,200,000
<p><b>Overall Status</b>                      On July 15, 2022, the DAWG Program was re-baselined to officially capture updated scope and timelines that the program team had planned out last quarter. The project team was focused on three major work efforts that are keys to completion of the project and transition to operations:                      1) task force actions to improve system performance,                      2) extending/building out the Test environment for new requirements and scope, and                      3) decommissioning of the legacy Enterprise Data Warehouse (EDW).</p> <p><b>Recent Activity</b></p> <ul style="list-style-type: none"> <li>Identified the root causes of performance issues and implemented four discrete solutions leading to significant improvements based on initial feedback from users. Additionally, the "Voice of the Customer" forum continues to receive and respond to ongoing feedback from users.</li> <li>Received all outstanding hardware from the vendor and started re-build of the Test environment. Supply chain issues delaying delivery resulted in a two week delay in planned project completion from December 30, 2022 to January 13, 2023.</li> <li>Decommissioned 64 of 102 servers on EDW platform.</li> </ul> <p><b>Next Major Milestones</b></p> <ul style="list-style-type: none"> <li>Transition ongoing DAWG performance support to operations by October 31, 2022.</li> <li>Complete DAWG Test environment re-build by November 21, 2022.</li> <li>Decommission remaining 38 servers by January 6, 2023.</li> </ul> <p><b>Risks/Issues</b></p> <ul style="list-style-type: none"> <li>Discussions are progressing, but the operational support model has not yet been finalized.</li> <li>The new budget of \$6.2 million presented on this report reflects a \$1.2 million increase above the original \$5.0 million budget. The increase in budget reflects the capture of major capital expenditures originally in non-project budgets and not a reflection of overall increase of project costs. These budgets were moved to the project to better capture the project true costs.</li> </ul>										
<p><i>Updated by Walt Baker 10/7/22 &lt;reviewed by Kristal Mauritz-Miller and Rich Selenis&gt;</i></p>										

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**Electronic Document Management System Replacement**

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
<b>Electronic Document Management System Replacement</b>	Anja Canfield-Budde	2 - UW	7	1	1	1	2	2	\$1,545,073	\$3,006,290

**Project Objective:** This is the final implementation/migration phase of a project to replace the underlying technology for UW-IT's enterprise Document Management System (DMS). We are replacing the legacy Oracle WebCenter (on-premises) solution with the DocFinity solution, a cloud-based product from Companion Data Services (CDS), and migrating existing customers to DocFinity.

**Overall Status:**

- Phased migration of current customers (21 total) started late in March, and to-date we have migrated seven customers.
- The team is on track to complete all customer migrations by March 2023, and to complete decommissioning of the legacy Oracle application by the end of May 2023.

**Major accomplishments:**

- Migration of Tacoma: Veteran and Military Services completed in June 2022.
- Migration of the Office of Academic Personnel and Student Fiscal Services completed in July.
- College of Arts and Sciences: HR Migrated mid-August and Advancement: Endowments will migrate mid-October.
- All migrations are preceded by verifying customer requirements, demo/training and User Acceptance Testing (UAT).
- EDM team completed Advanced Capture training and installation, in preparation for Procurement documents migration later this year.
- The DMS Service Team continues to meet with several existing customers in parallel to prepare for requirements gathering and training in preparation for their migration to DocFinity.
- UW Facilities migration Kick off to reset the expectations around the migration and training was held on September 9th.

**Next Steps:**

- Confirm detailed migration schedule for Facilities, see Issue below.
- Continue integrations/Application Programming Interface (API) work with impacted departments which will complete development and testing.
- Confirm fixes for all medium priority accessibility issues with DocFinity version 12.

**Risks & Issues:**

- *Issue:* UW Facilities is requesting extensive evaluation and testing of the new DocFinity system before agreeing to a migration timeline. The EDM Team is spending a lot of time to support advanced testing, well ahead of the scheduled requirements gathering and user testing. This is not a sustainable approach.  
*Mitigation:* The team is working on re-setting the expectations of Facilities leadership and creating a detailed plan for all migration activities which then can be used for agreement between teams.
- *Issue:* The EDM Team lacks accessibility and QA expertise.  
*Mitigation (short term):* The EDM Manager can fill this role but this is not a long term solution. Working hard to fill the accessibility and testing gaps.

Snezana Popovic. 9/27/2022

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Salesforce Conversion										
Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
<b>Salesforce Conversion</b>	Frank Hodge	2 - UW	12	3	3	2	1	3	\$1,645,651	\$1,607,217
<p><b>Project Overview:</b> Project migrates Foster's masters recruiting and admissions CRM from end-of-life Radius CRM to Salesforce, and full lifecycle management for our executive education certificate programs. We've also expanded use of CRM to include application and review for the undergraduate major, Writing Skills Assessment, and various program applications.</p> <p><b>Overall Status:</b> On schedule and revised budget. All masters programs have migrated except Day/Evening MBA; we expect to have them migrated by the end of December. Executive Education's business process mapping is complete, work necessary to accept payments in Salesforce (minimum viable product) will be complete by November 30, 2022, on schedule.</p> <p><b>Milestones:</b></p> <ul style="list-style-type: none"> <li>• Migrate Day/Evening MBA Program</li> <li>• Migrate Executive Education</li> <li>• Complete Marketing Automation scope identified by Foster Marcomm</li> </ul> <p><b>Next Steps:</b></p> <ul style="list-style-type: none"> <li>• With ExEd process mapping complete, our consultant is building necessary forms and business logic in the test environment. Testing will follow.</li> <li>• Assuming a successful test cycle, new code will be pushed to production on or about Nov 18 with minimum viable product launching Dec 1.</li> </ul> <p><b>Risks &amp; Issues:</b></p> <ul style="list-style-type: none"> <li>• Failure to complete MBA migration by December will result in additional cost of approximately \$50,000 to extend the license for Radius an additional six months. If that happens, the program's budget will bear the additional cost. Program staff are aware of the deadline and project impact. Resources and budget are adequate to manage risk.</li> </ul>										
October 28, 2022 - Mick Westrick, Director of IT, Foster School of Business									<b>NEW</b>	

Notes:

(B) The Salesforce Conversion project has been underway for some time, and was not being tracked until an implementation consultant was added to the project, so is new to this report.



### Graduate School Admissions Modernization

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
<b>Graduate School Admissions Modernization</b>	Joy Williamson-Lott	2 - UW	8	1	2	1	2	2	\$62,640	\$545,000

**Project Overview:** This project will implement a full replacement of the MyGrad (in-house built) grad student admissions system with a cloud-based solution, Slate, which will provide graduate admissions capabilities for all graduate applicants to the UW across all three campuses. Key deliverables will include improvements in efficiency, automation, accessibility, mobile device compatibility, reporting capabilities, applicant experience, and technical support. The Graduate School will fund this project, with possible additional longer-term funding support to be considered from the Provost's office.

**Major Accomplishments:**

- Completed the RFQ and procurement process to contract Strata Information Group (SIG), a Slate specialist consulting firm who will provide project management, business analysis, implementation management, and system setup services for the project
- Completed the supplier registration, data processing agreement, and netID creation request tasks to enable SIG access to build and configure our test and production systems
- Kicked off the implementation phase with SIG and began analysis and implementation planning work covering phases through Q3 2023
- Kicked off reactivation of the GTAC and met with leaders from across campus to present project status and work ahead, with quarterly GTAC meetings planned going forward
- Continued monthly UW Admissions Community of Practice meetings to share project status and lessons learned from other teams and resources with admissions-related responsibilities and past Slate lessons learned

**Key Upcoming Milestones:**

- Begin business analysis sessions with department users and subject matter experts to map processes and current state activities and configurations
- Complete initial training of key UW Graduate School staff through Technolutions and SIG's recommended courses and resources
- Identify Slate Captains, a Technolutions-defined operational role that will be filled by UW staff and be integrated into the implementation and launch activities
- Update the Graduate School's project website with status and key highlights for on-demand access by GTAC and UW community members
- Finish planning change management and communications activities based on outputs from the department analysis sessions
- Begin scoping post-launch (aka phase 2 in late 2023) work, including third-party integrations for iSchool/Noodle, Law/LSAC, Foster/Consortium, Public Health/Sophos
- Continue quarterly GTAC meetings and monthly Admissions Community of Practice meetings, plus ad-hoc Graduate School presentations on project updates
- Complete initial system setup and planning for upcoming accessibility and user testing phases

**Risks & Issues:**

- *Risk:* Resource capacity and availability may be a challenge given the scope of work involved. This risk will be addressed continuously throughout the project.
- *Risk:* Some business processes will be changed based on the structure of the system selected, and some changes won't be known until after that selection is finalized.
- *Risk:* Because of the admissions process and related business cycle, there is a specific time when process changes can be made with minimal impact. Missing the planned go-live date of July 2023 would mean the next viable option is a full year later (July 2024).
- *Risk:* There will be several integrations between Slate and third-party/external applications, as some UW graduate programs and disciplines use national applications. These include the iSchool, Law/LSAC, and possibly Public Health. Business users may also have additional unique needs that will have to be included in our planning. This risk will be managed by including separate requirements during planning, working directly with these programs, working with peer institutions, and by working with the vendor and likely an independent Slate consultant.
- *Risk:* The Graduate School currently has a data transfer process in place with UW-IT Student Database. Graduate School staff have technical knowledge to make the necessary changes, but some testing support is needed from UW-IT.
- *Risk:* Schools and Colleges with systems that connect to the Graduate Schools through APIs will have dependencies on the Graduate School in order to make their changes.

Jeff Parks, 10/06/2022




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UWF AiMR										
Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
UWF AiMR	Tim Rhoades	1 - UW	10	1	1	2	3	3	\$211,326	\$402,500
<p>Facilities has lost several key project resources in the last several months. This, coupled with ongoing challenges with Finance Transformation has resulted in a reduction in scope for our July 2023 go-live. We will be shifting all but two key project goals to a later phase. Our two highest priorities for July 1, 2023 go-live will be moving from our current on-prem (UW-IT hosted) solution to the vendor SaaS solution and WD Finance integrations.</p>										
<p><i>Ann Wold 10/10/2022</i></p>										

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Gradescope										
Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
Gradescope	Aaron Timss	1 - UW	8	2	2	2	1	1	\$266,000	\$267,000
<p><b>Project Overview:</b> Paul G. Allen School of Computer Science and Engineering (CSE) is implementing Gradescope, a SaaS solution provided by Turnitin, LLC. The project originally expanded the use of Gradescope within CSE and three other academic departments (Chemistry, Math and Applied Math), but has since grown to also include Chemical Engineering, ECE, Statistics, and the iSchool. In addition, Biology and Physics are now testing in limited set of courses. The project/licensing takes advantage of the efficiency and benefits provided by integrating Gradescope with the Canvas Learning Management System (LMS). The project is structured around a "Growth License" that opens up access to other units more broadly over time for possible university-wide adoption. GradeScope integrates with Canvas in three ways: GradeScope's Applications Programming Interface (API), a Learning Tools Interoperability (LTI)-powered "pull" interface, and a "push" interface through the GradeScope web console.</p> <p><b>Overall Status:</b> Project still on-track with budget, schedule and scope. Budget amount of \$265,000 has been increased to offset/account for the "nearest \$1,000.00" increments that have been added each summary period. As to be expected, there is always some amount of administrative overhead associated with our project each quarter. Even if many quarters it has been relatively minimal, we have still been asked to reflect the work to the nearest \$1,000.00, meaning "Actual Cost" in the table does not necessarily accurately reflect the actual cost, which is quite a bit lower over all.</p> <p><b>Milestones:</b></p> <ul style="list-style-type: none"> <li>• Year 3 invoice cost added to "Actual Cost"</li> <li>• Added Biology and physics as new partnering units</li> <li>• Initiated project to review Gradescope services and associated UW business processes against various UW Records Retention Schedules to refine and ensure necessary alignment with requirements</li> </ul> <p><b>Next Steps:</b></p> <ul style="list-style-type: none"> <li>• Continue work with Gradescope's Engineering and Administrative leadership along with UW Records Management to introduce and implement refined data retention and deletion strategies according to UW records retention schedules</li> <li>• Continue to work with Gradescope's team and UW-IT to determine options for Year 4 based on established as well as predicted usage trends</li> </ul> <p><b>Risks &amp; Issues:</b></p> <ul style="list-style-type: none"> <li>• None identified at this time</li> </ul>										
Rebekah Hansen - 10/10/2022										

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<p>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.</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)	
Current Risk Rating	Use the scales below to rate current performance on Schedule, Scope and Budget (select appropriate number for each)...
Budget, Schedule, Scope	<p>1 = Performing better than project plan; ahead by 5% or more (Schedule and Scope only)</p> <p>2 = Performance is on plan</p> <p>3 = Behind plan, but within 5% of original targets. For Budget, over <u>or</u> under spending within 5% of plan.</p> <p>4 = Behind plan between 6% to 10%. For Budget, over <u>or</u> under spending by 6-10%, and likely to use/using contingency.</p> <p>5 = Greater than 10% behind plan. For Budget, over or under spending by &gt; 10%, and more than half of contingency is projected to be used.</p>
Current Risk Rating	Use the scale below to rate current performance on Resources
Resources	<p>People with the necessary expertise are....</p> <p>1 = in place, or high likelihood of being available as specified in the Resourcing Plan.</p> <p>2 = There are some minor gaps in resourcing, but can be overcome with minor alternations of Resourcing Plan, with no significant impact on schedule, budget or deliverables.</p> <p>3 = somewhat in place, or struggling to perform, with moderate risk to schedule, budget or deliverables.</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.</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.</p>
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)
Issues, Risks, & Project Dependencies	<p>1 = No risks or issues identified at this time</p> <p>2 = Some identified but minor, no impacts anticipated</p> <p>3 = Some that could impact the project are being managed, with minimal impact anticipated</p> <p>4 = Significant risks/issues/other factors identified but not yet managed</p> <p>5 = Risks/issues being managed but will have significant impact (greater than 10%) on project budget, schedule and/or scope</p>