

IT STRATEGY BOARD

April 27, 2022

INFORMATION TECHNOLOGY

UNIVERSITY *of* WASHINGTON



AGENDA

- > Call to Order
- > Welcome from the new CIO
- > IT Governance discussion
- > IT Project Portfolio Executive Summary and UW FT Combined Quarterly Report
- > Wrap up

Welcome from the New CIO

Andreas Bohman

Vice President for UW-IT and CIO

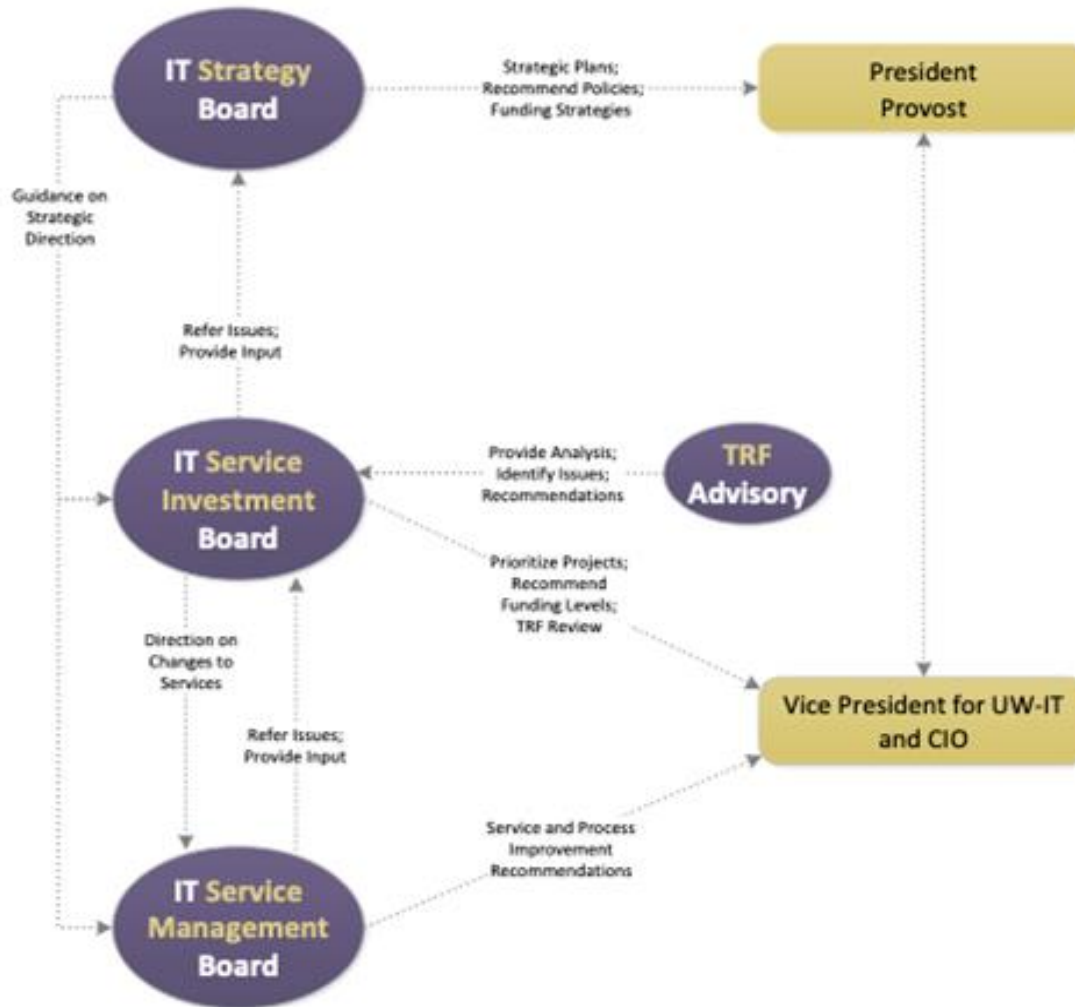


IT Governance Discussion

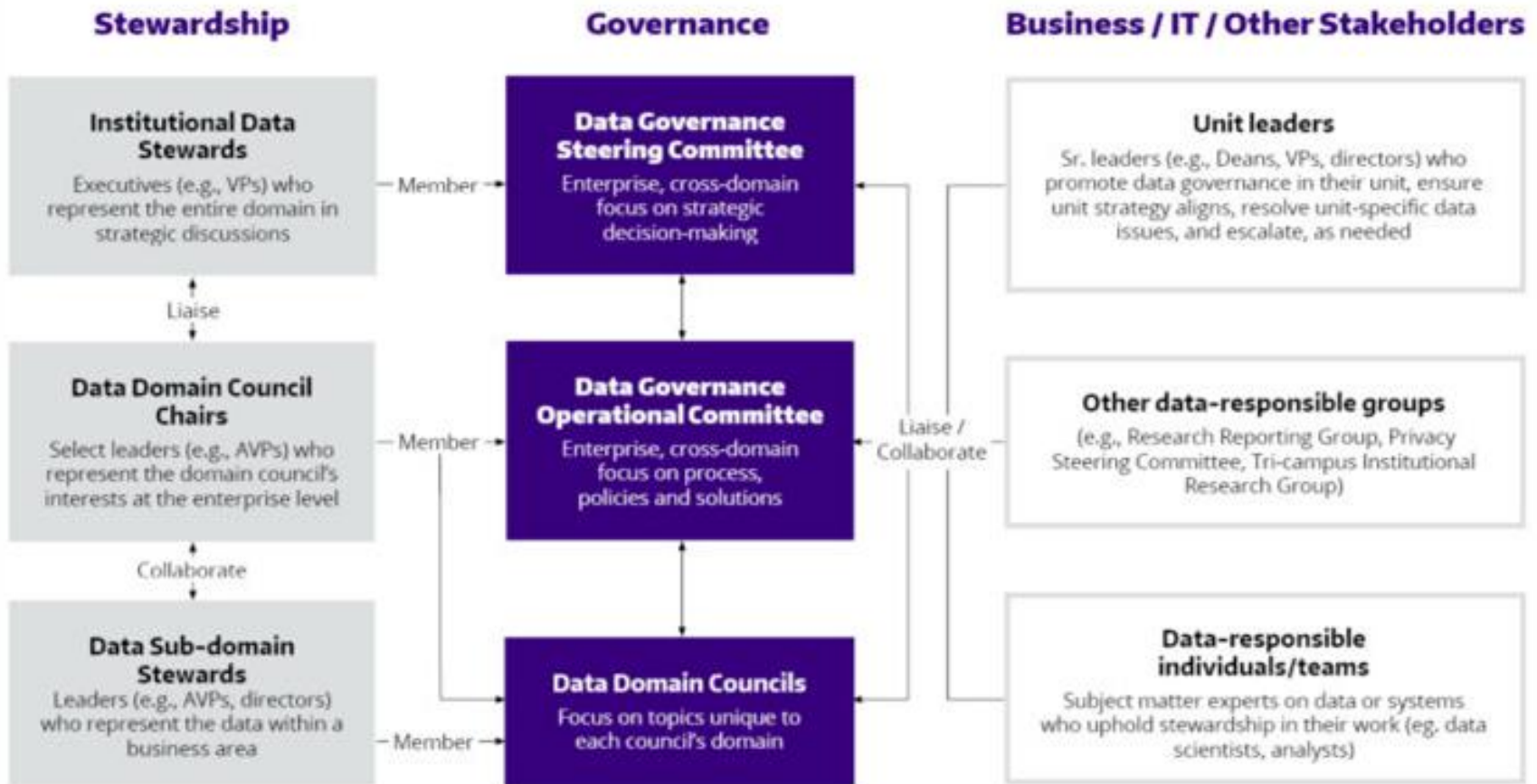
Andreas Bohman
Vice President for UW-IT and CIO



IT Governance at the UW



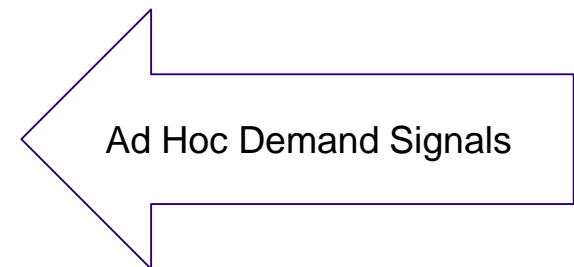
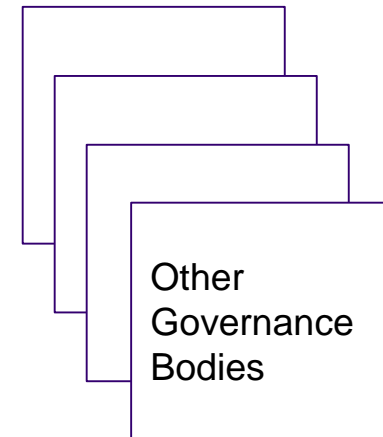
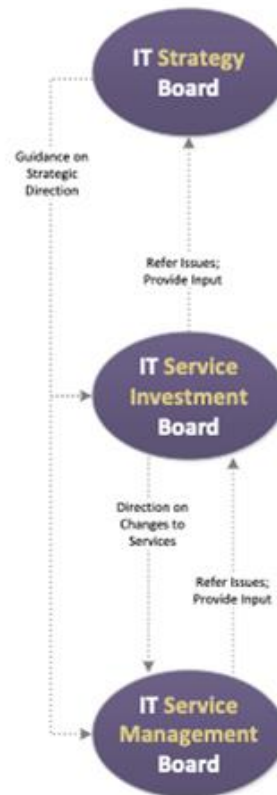
UW Data Governance



Other IT Governance

- > Faculty Council on Information Technology & Cybersecurity
- > Hyak Governance Board (HGB)
- > Report Prioritization Group (RPG)
- > Security Advisory Committee
- > Privacy Steering Committee
- > UW Bothell and UW Tacoma
- > UWFT Program Governance
- > and many others...

How Do All These Groups Work Together?



IT Requests Come From All

Group A

Thinking about your constituents and/or partners:

- > How would you like to improve their experience over the next in 2 to 5 years?
- > What is the role of IT in driving these improvements?
- > What are the IT opportunities that the University should pursue?

Members: Aaron Powell, Kristin Esterberg, Dan Turner, Denzil J Suite, Joy Williamson-Lott (with Piet)

- > **Adaptive technology in classrooms** (and in other areas such as web sites)
- > Technology that enables flexibility for **remotely/hybrid** -- without putting t
 - Enabling our overall shift to hybrid
 - Keeping us competitive in employment
- > **Better support students** through the
- > Get better data into the hands of deo
 - Multiple offices can contribute
- > Make more **“global” decisions on so** more centralized knowledge and po
 - Leverage advantages of both ce
- > Help faculty and staff **better use info** (such as policy and compliance requi
- > Use **technology to enhance physical**
- > Work as a community on **cyber-secu**
- > Attention for **older systems** that are

IT Service Management Board Recommendations

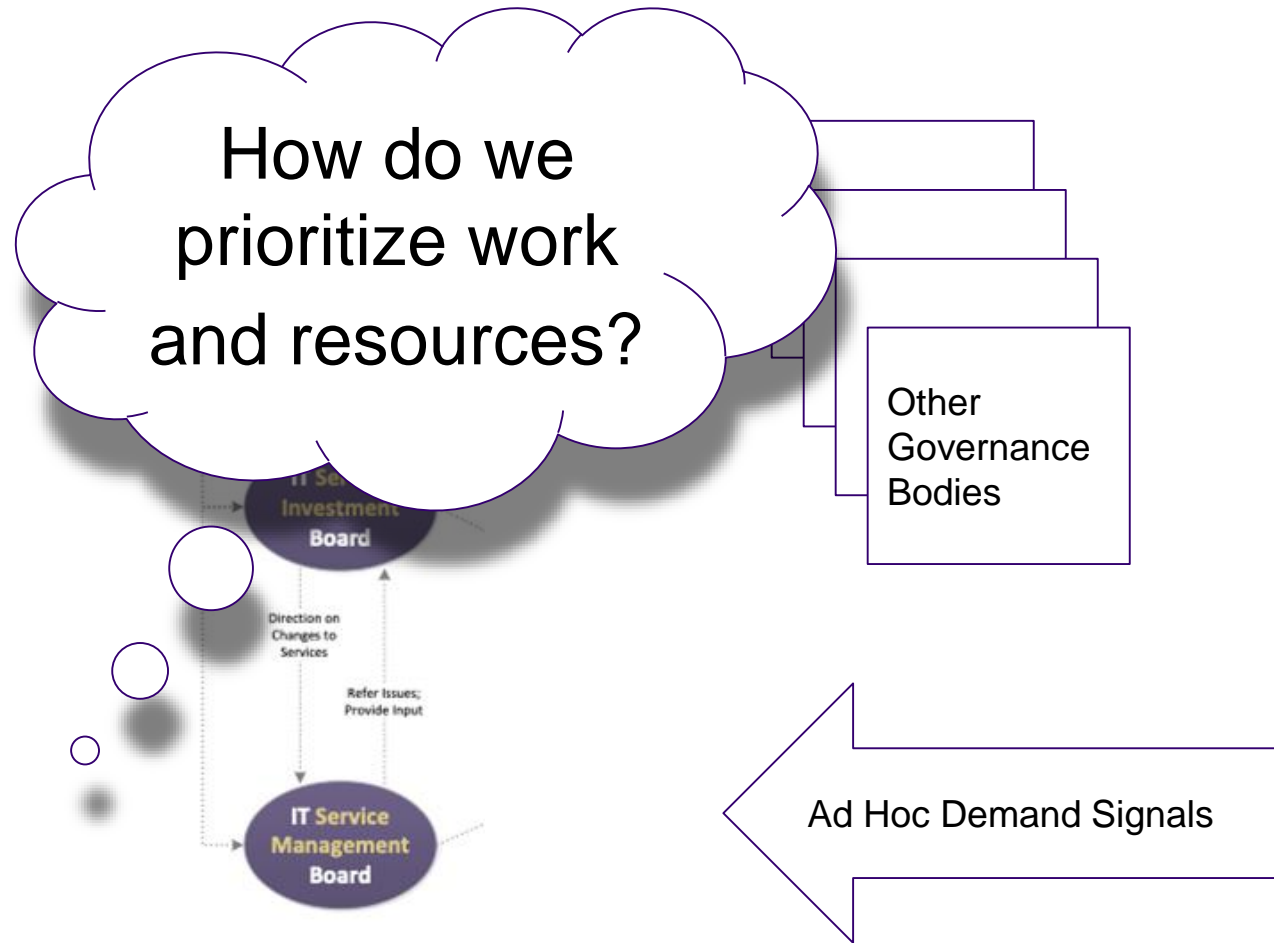
Published February, 2020:

“Actionable in the near term. Informative in a larger strategic context.”

1. **Enterprise Service Management investment**
2. **Standardize and consolidate Admissions applications** and review systems
3. Implement Student Database improvements and application interface
4. **Develop a centralized online software registry**
5. Develop and publish guidance for **“pre-qualified” Customer Relationship Management systems**
6. Promote and **support the implementation of 25Live for space scheduling** and management
7. **Adopt Zoom** as the preferred campus-wide solution for video conferencing and collaboration



Our Governance Model at the UW



Governance Operating Model

In order to best support the institution, what is our decision-making engine to drive strategy?

- > Who decides which new IT request needs action, and what level of priority to turn request into strategy?
- > How does funding get allocated to the new request?
- > What's the right operating model to build/run this new strategy? (centralized, federated, distributed)
- > Who builds/runs the strategy?
- > What kind of support would the board need to play this role?

Discussion: Governance Operating Model

QUESTIONS



IT Project Portfolio Executive Summary and UW FT Combined Quarterly Report

Erik Lundberg

Assistant Vice President, Research Computing & Strategy,
UW-IT



UW Enterprise IT Projects

Project Portfolio Executive Summary - 03/31/22

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
Finance Transformation Combined Program	Mark Richards Chris Mercer	UW	(A)						\$171,977,000	\$339,906,000
Advancement CRM Replacement	Julie Brown Dan Peterson	3 - OCIO	(B)						\$4,084,000	\$4,100,000
UWM Data Analytics Warehouse	Mo Broom, Richard Goss	2 - UW	(C)						\$4,199,000	\$5,031,000
Electronic Document Management System Replacement	Anja Canfield-Budde	2- UW	(D)						\$1,007,000	\$3,006,000
Graduate School Admissions Modernization	Joy Williamson-Lott	2- UW	<i>New</i>						\$0	\$0
UWF AiMR	Tim Rhoades	1 - UW							\$107,000	\$403,000
Gradescope	Aaron Timss	1 - UW							\$159,000	\$265,000

7 projects

\$181.5M



\$352.7M

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.

Overall Program health changed by one point.
- (B) AdvCRM is trending down (by two points), and is in the process or re-baselining the budget, schedule and scope.
- (C) DAWG has re-baselined Schedule and Scope to significantly improve health (by four points), and is in the process of adjusting budget.
- (D) EDM has successfully re-baselined to bring health back to green (by eight points). Last quarter was yellow, and trending toward red.



Program Operations	Executive Leadership	Program Area	Status	Major Projects Interdependencies Assessment	Note: ISC and UW-IT resources are tracked within the major projects' budgets
Integrated Service Center	Ann Anderson	Major Projects		<p>Overall rating: Green-Yellow. This rating relates to the impacts of UWFT and other new work requests to balance against current commitments.</p> <p>Large Projects:</p> <ul style="list-style-type: none"> • HB2669 – adding part-time employees to state civil service. Anticipated implementation July 1, 2022; testing scheduled to begin May thru June. • UWFT – The FT Program begins Cycle 1 of End-to-End testing on April 4. We are working through design recommendations in partnership with FT and have as a top priority to understand the impacts to ISC current configuration and stable processes. ISC teams have had a more active role in Cycle 1 testing than anticipated and hope to gain additional insights from the test results. (Details of the work in the FT Program are captured in the Combined FT report.) <p>Issues:</p> <ul style="list-style-type: none"> • Like all departments across the university, the ISC continues to experience attrition. The subsequent recruiting and on-boarding impacts our resourcing. • Our project work continues to be fluid and heavily dependent upon state statutes and regulations. • Critical to our success is the agreed upon process to submit new large project work for review by the Workday Committee for prioritization and, if needed, resourcing and funding. 	
UW-IT	Andreas Bohman	Major Projects		<p>Overall rating: Yellow</p> <ul style="list-style-type: none"> • Adv CRM (UW-IT internal supporting project) – End date extended, with new go-live date still TBD. The closer the new ADV go-live date moves to FT go-live, the greater the risk of severely limited UW-IT resource availability. • UW FT – The amount of contributed labor required of UW-IT staff continues to increase; which could have an impact on normal operations; this is being closely monitored. Concerns around decision timelines and open questions remain. • FT Post Go-Live – A new Process Transformation Team (PTT) effort has started to scope and clarify the unit-level roles and responsibilities for ongoing operations, includes UW-IT representation. UW-IT is defining and sizing that work through an internal project. There will incur technical debt (future project work needed to remediate) The scope of that debt is not yet understood, but will likely be significant. • Staffing Risks – In addition to above, the two major projects, UW FT and Adv CRM, are at risk due to staffing. 	

Completed Projects - Mar 31, 2020




Project	Sponsor	Oversight Level*	Go Live Date	Project Completion Date	Total Project Cost (\$K)
Clinical Trials Management System	John Slattery	2-UW	Sept 13, 2021	Dec 31, 2021	\$12,257,000
MSIM Online Program Management	Anind Dey	2-UW	Mar 1, 2021	Dec, 2021	\$226,000
Public Records	Ann Anderson	1-UW	Oct 20, 2021	Jan, 2022	\$1,050,000

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

UW FT Combined Program

Executive Summary - 3/31/2022

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	UW	↓ ^(A)	●	●	●	↓	●	\$171,977,000	\$339,906,000
Functional	Paula Ross	Program	↓	●	●	↓	●	●	\$17,493,924	--
Technical	Gail Rogers	Program	↓	●	↓	●	●	●	\$26,040,587	--
Change Management	Jeff Bishop	Program	↓	↑	●	●	↓	↑	\$4,844,015	--
Project Management	Elise Barho	Program	↓ ^(B)	●	↓	●	●	↓	\$4,255,819	--

Enterprise Systems Remediation

UW Medicine	Sarah Cantwell	●	●	↓	↑	●	●	\$10,089,623	--
Research Administration	Ryan Green	↓	↓	●	●	↓	●	\$6,592,004	--
Finance Readiness Program	Jeanne Marie Isola	↓	↑	↓	●	↓	●	\$5,866,683	--
Integrated Service Center	Greg Koester	●	●	●	●	●	●	\$1,337,102	--
UW-IT	Rob McDade	↓	↓	●	●	●	↓	\$4,665,388	--

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

Unit Readiness	<i>Overall readiness of academic, medicine and administrative units</i>	●	The Systems Design Support (SDS) retirement sessions have begun. Outside of the SDS sessions, the program has not fully defined responsibilities and processes for engaging with campus on topics such as testing and cutover.
Side System Remediation	<i>Overall status outside the Core Program and Enterprise Systems</i>	●	Some campus units are behind in their deliverables and escalations are proceeding to assist them. Also working with Units to help determine best E2E cycle. Only one of 30-40 systems that need to integrate with Workday has engaged with the Program.

9 separate projects under one Combined Program, plus 2 areas of work across the campus

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.

Overall Program health changed by one point.

(B) Four FTE were transferred from EP MO to the Functional Pillar. The budget and actuals – including history – for those staff were transferred as well.



QUESTIONS



QUESTIONS AND DISCUSSION

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