

## Tell Your Story

### *Background information to gather about the environment and stakeholders*

Avoid reduplicating past efforts and instead try to use existing data and documents. Almost every source of information that you have will help: Internal documentation, web pages, presentations, artifacts of work processes (e.g. closed help desk tickets) and correspondence are all valid. In gathering these materials, try to find either the most “canonical”, most clear or most accurate description of each of the following:

Information to gather	What/Why
<b>Organizational Mission</b>	This could be as concise as a single phrase on your organization’s internet-facing home page.
<b>Program or Service</b>	What your UW organization is offering to those communities that your organization helps. Specifically, those offerings that will be changed by the proposed IT system.
<b>Duties to customer</b>	How the communities of stakeholders are helped by your organization’s programs, especially where those communities rely upon your organization’s program.
<b>Legacy system</b>	Is this a totally new capability with no previous legacy? Is the “legacy system” not really a formal IT system? (e.g. There is a living document in Excel that tracks a pipeline of Word documents through a hierarchy of subfolders in a shared file directory, and over the years a shared understanding of how to navigate this has evolved between colleagues.) Otherwise: What is the name of the existing system(s) that everyone uses? Often this is the name of the vendor rather than the product name (e.g. Oracle)
<b>Workflow (Architecture)</b>	Is there any documentation that identifies: <ul style="list-style-type: none"><li>• The systems upstream and downstream of the proposed system?</li><li>• The system boundaries and interface points?</li></ul>
<b>Team Roster</b>	Identify the people in your organization that will use and/or support this system. However identify them by <b>role name</b> rather than individual name. (e.g. “There are two <i>reviewers</i> ” rather than “Waldorf and Stadler will use this system.”)
<b>Executive Head of the Major University Organization</b>	Who within the organization will formally own the risk?

It is likely that you will discover *other relevant information* that does not fall into any of the above categories. It is also likely that you will have *little or no information* written down about some of the above categories. This is not a bad thing! It turns out that both of these are important discoveries:

- The *other relevant information* tends to be **organization specific considerations** that need to be explained to a wider audience who may not appreciate the proposed IT investment without this additional context.
- Discovering that there is *little or no information* about something is a way of identifying a **known unknown**.

**Rule of Thumb:**

- The proposed investment is a plan that starts in the current state of your organization and goes from there.

### *Situational Narrative (Motivation)*

In parallel with gathering background material, it helps to compose a brief *situational narrative* that you can adapt and re-use at various points throughout the process. The situational narrative describes the driving *motivation* behind the IT investment effort. IT investment tends to be driven by a combination of two factors:

- A new or developing situation creates a need or opportunity.
- The organization hopes that an IT investment will improve the organization's ability to bring benefits and reduce harms to constituent stakeholders.

Ideally, the explanation for the motivation can be understood by a broad and diverse audience.

#### **Sample motivations:**

- **A last straw event will affect the rights of a large number of stakeholders:**  
UW's legacy system was developed in-house many decades ago. Although it has been stable for a long time, once *the WA legislature enacts its new regulation on this activity*, it will not be possible to continue to operate the legacy system. This system is needed for *all undergraduate students for civil rights protections*.
- **Developing situation**  
Because of *COVID-19*, the *venue* needs to be able to offer a *tool/capability* to *faculty* that enables them to *design immersive online experiences for distance learning*.
- **End of support life**  
UW has operated the on-premises version of *vendorname productname* for many years. On December 31st of this year, no more security patches or technical support will be available from the vendor. All of our *specific types of records* needed for an *essential activity* are stored and processed on this system.
- **Funding is dependent on using this vendor**  
*NIH* has specified that all participants in a multiple institutional study must contract with a *vendor* to use a *specific platform*.
- **Funding is dependent on picking any vendor**  
The project sponsor has required that to obtain funding for the next phase, there must be a working prototype...
- **Regulatory requirement**  
To comply with a *law* it is necessary for the department to maintain a database of *specific types of records* and to enable *individual members of the public* to request information that UW may be holding about them and why UW is holding that information.