

UW FT Combined Program

Executive Summary - 3/31/2021

| Project | Sponsors & Leaders | Program Area | Overall Risk & Project Health * | Budget Rating | Schedule Rating | Scope Rating | Resource Rating | Issues Rating | Actual Cost | Budget | |
|--|--------------------------------|--------------|---------------------------------|---------------|-----------------|--------------|-----------------|---------------|-------------|--------------|---------------|
| Finance Transformation Combined Program | Brian McCarten Aaron Powell | UW | ↓ (A) | ↓ | ● | ● | ● | ● | ↑ | \$94,522,000 | \$269,246,000 |
| Functional | Ed Loftus | Program | ● (B) <i>New</i> | ● | ● | ● | ● | ● | | | |
| Technical | Gail Rogers | Program | ● (B) <i>New</i> | ● | ● | ● | ● | ● | | | |
| Change Management | Jeff Bishop | Program | ● (B) <i>New</i> | ● | ● | ● | ● | ● | | | |
| Project Management | Elise Barho | Program | ● (B) <i>New</i> | ● | ● | ● | ● | ● | | | |

Enterprise Systems Remediation

| | | | | | | | | | | |
|----------------------------------|--------------------|---------------------|---|---|---|---|---|---|--|--|
| UW Medicine | Sarah Cantwell | ↓ (B) | ↓ | ● | ● | ● | ● | ● | | |
| ORIS | Diego Bartholomew | ↓ (B) | ↓ | ↓ | ↓ | ↓ | ↓ | ↓ | | |
| Finance Readiness Program | Jeanne Marie Isola | ↓ (B) | ↓ | ● | ● | ● | ↓ | ● | | |
| Integrated Service Center | Greg Koester | ● (B) <i>New</i> | ● | ● | ● | ● | ● | ● | | |
| UW-IT | Rob McDade | ↓ (B) | ↓ | ↑ | ↓ | ↓ | ● | ● | | |

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

| | | | | | |
|--------------------------------|--|---|---|--|--|
| Unit Readiness | <i>Overall readiness of academic, medicine and administrative units</i> | ● | <i>Piloting a unit readiness dashboard process that leverages unit readiness leads to track and status unit-level readiness</i> | | |
| Side System Remediation | <i>Overall status outside the Core Impl. Program and Collab Partners</i> | ● | <i>Piloting a resource allocation process to engage units in determining scope of work and effort required for remediation efforts, at unit level</i> | | |

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

Notes:

(A) The UW FT Combined Program Status Report has been reformatted to align with the new organizational structure. It is a composite of four of the five Program Areas, with the fifth, Enterprise Systems, broken out into its constituent Projects. Overall Ratings are computed as the average of all five constituent projects; except that Schedule is 'maximum' of others. Budget and spend for individual program areas has not yet been determined.

(B) Individual Program Pillars and Enterprise Remediation areas rated their own status, based on current state, and with the perspective that overall Program reset options are under consideration.



| Campus Engagement | | | | | |
|--|--|-----------------------|---|-------------|-------------|
| Campus Engagement | Description | Overall Risk & Health | Stauts | Actual Cost | Budget |
| Unit Readiness | <i>Overall readiness of academic, medicine and administrative units</i> | R | <i>Piloting a unit readiness dashboard process that leverages unit readiness leads to track and status unit-level readiness</i> | \$0 | \$0 |
| Side System Remediation | <i>Overall status outside the Core Impl. Program and Collab Partners</i> | R | <i>Piloting a resource allocation process to engage units in determining scope of work and effort required for remediation efforts, at unit level</i> | \$0 | \$7,134,000 |
| <p>OVERALL STATUS: Campus communications to date have been confusing and unproductive to date. Campus units do not have enough information to remediate their systems and the Operating Model has not been designed. It is unclear as to whether they have resources to complete necessary work. Business process efforts have focused on Workday processes and have not focused on ensuring that external processes provide accurate inputs to Workday.</p> <p>Major Accomplishments:</p> <ul style="list-style-type: none"> • Estimates receive in March for key campus remediations • Change network established <p>Key Upcoming Milestones:</p> <ul style="list-style-type: none"> • Technical conference to be scheduled to share key information regarding Financial Data Model (FDM), reporting, data platform design, etc. • System design sessions to be established to work with campus technical units • Operating Model design to be completed in June <p>Staffing Resources:</p> <ul style="list-style-type: none"> • Some campus units have insufficient resources to complete their remediations <p>Issues and Risks:</p> <ul style="list-style-type: none"> • Current estimates for remediations show some critical units unable to complete remediations by start of End to End testing • Previous communication efforts have not provided sufficient information which has led to frustration on the part of campus resources | | | | | |
| <i>Gail Rogers, 04-11-21</i> | | | | | |

| Functional | | | | | | | | | | |
|--|-----------|--------------|---------------------------------|---------------|-----------------|--------------|-----------------|---------------|-------------|------------|
| Project | Leader | Program Area | Overall Risk & Project Health * | Budget Rating | Schedule Rating | Scope Rating | Resource Rating | Issues Rating | Actual Cost | Budget |
| Functional | Ed Loftus | Program | 15 | 2 | 5 | 2 | 3 | 3 | | |
| <p>OVERALL STATUS: Overall the functional team has been focused on supporting the other Pillars through Architect Validation Stage (AVS) via continued iteration of of business processes, refinement of the Financial Data Model (FDM), supporting System Design Approach (SDA) processes, and providing Subject Matter Expert support of Enterprise System request for additional clarity regarding open questions impeding other pillar progress. The team has delivered and or supported the required AVS exit criteria as well as continuing to make progress on Configure & Prototype (C&P) related deliverables as rescope for AVS. Note: some traditional C&P items for the Functional team that would have been deliverable post AVS had progress slowed or dates pushed out to support the AVS needs. Post AVS Work Breakdown Structure (WBS) will return the Functional team to a more predictable cadence and align with the deliverables across the program.</p> <p>Major Accomplishments:</p> <ul style="list-style-type: none"> • Tenant 1.5 Tenant build deliverade ahead of schedule, • Assessment of Stage Deployment and UW Med first go-live provided, • Adaptive Insights senario planning for go-live options completed • Report inventory rationalized in support of scope valadation and rebaselining • Reporting has completed the Future State Reporting Inventory via User Stories and engagement with Major Units. • First round of review of the Testing Plan <p>Key Upcoming Milestones:</p> <ul style="list-style-type: none"> • C&P WBS finalization • Partner with Technical Pillar: System Remediation (via SDA), Integrations and Gap Applications • Sprint 2 Unit Testing • Testing Plan, Resouece Expectations and schedule development in parternship with Project Management Team • Determine Support Strategy <p>Staffing Resources:</p> <ul style="list-style-type: none"> • Assessmernts for schedule extension provided and review by program leadership • Vendor impact to extension assesed and revised estimates provided <p>Issues and Risks:</p> <ul style="list-style-type: none"> • Misalignment post AVS accross reorganized program may cause scope / resource gaps | | | | | | | | | | |
| Ed Loftus, 4/13/21 | | | | | | | | | | New |

Notes:

(B) Individual Program Pillars and Enterprise Remediation areas rated their own status, based on current state, and with the perspective that overall Program reset options are under consideration.

UWFT Combined Program Executive Summary - 3/31/2021

| Technical | | | | | | | | | | |
|--|-------------|--------------|---------------------------------|---------------|-----------------|--------------|-----------------|---------------|-------------|------------|
| Project | Leader | Program Area | Overall Risk & Project Health * | Budget Rating | Schedule Rating | Scope Rating | Resource Rating | Issues Rating | Actual Cost | Budget |
| Technical | Gail Rogers | Program | 22 | 5 | 5 | 3 | 4 | 5 | | |
| <p>OVERALL STATUS: The technical team now includes gap applications, conversions, and support for campus systems. These areas are understaffed and behind schedule so we are now working to determine how to add staff and catch up. Continuing problems exist in gathering functional requirements and getting detailed business decision-making completed in order for technical work to move forward. Key decisions such as whether to move eFECS functionality into Workday are currently blocking planning for remediating eFECS. Current remediation estimates from campus units exceed go-live and teams are working to add staff in order to provide campus units enough information about the program to proceed with their work. Reporting teams outside of Workday were staffed under the assumption that most reports were to be written within Workday but will not be the case. Teams are working to adjust.</p> <p>Major Accomplishments:</p> <ul style="list-style-type: none"> • Kicked off the tenant 2.0 build activities • Completed a Financial Data Repository (FDR) prototype and engaged with Entigence on a second Statement of Work for FDR build activities • Created new technical team and onboarded new resources • Created budget for a potential extension of the schedule • Completed version 2.0 of translator <p>Key Upcoming Milestones:</p> <ul style="list-style-type: none"> • Roll-out of new systems design plan to provide systems teams the functional/technical information they need to complete their work • eFECS decision • FDR Wave 1 information <p>Staffing Resources:</p> <ul style="list-style-type: none"> • Submitted request for the next 21 resources in budget necessary to complete technical work. Without approval, recruiting will stop • Working to staff additional vendor resources to achieve scheduled work <p>Issues and Risks:</p> <ul style="list-style-type: none"> • Campus outreach has been unproductive and confusing for campus. Key campus units will not be ready for go-live if not addressed. Campus remediation estimates exceed go-live • eFECS task force decision has not been made and remediation planning is blocked • Solution for cross-era reporting has not been completed which impacts the conversion, reporting, and remediation teams across enterprise systems teams • Currently approximately 1% of grants data has been loaded and 60+ sources for Record To Report data have not provided data • Systems design sessions for priority 1 systems missed deadlines for completion by end of phase | | | | | | | | | | |
| Gail Rogers, 04-11-21 | | | | | | | | | | New |

Notes:

(B) Individual Program Pillars and Enterprise Remediation areas rated their own status, based on current state, and with the perspective that overall Program reset options are under consideration.

| Change Management | | | | | | | | | | |
|--|-------------|--------------|---------------------------------|---------------|-----------------|--------------|-----------------|---------------|-------------|------------|
| Project | Leader | Program Area | Overall Risk & Project Health * | Budget Rating | Schedule Rating | Scope Rating | Resource Rating | Issues Rating | Actual Cost | Budget |
| Change Management | Jeff Bishop | Program | 10 | 1 | 3 | 2 | 1 | 3 | | |
| <p>OVERALL STATUS: OCM is on track with Architect Validation Stage(AVS) work and finalizing OCM's Scope, Schedule and Budget details for the new program plan. Campus engagement is good but units are eager to understand the new plan, get answers and begin moving forward with the new direction.</p> <p>Major Accomplishments:</p> <ul style="list-style-type: none"> • Completed <i>Initial Change Impact Assessment</i> • Completed <i>UWFT Training Strategy</i> • Multiple Architect Validation Stage and Re-org communications and support materials to educate stakeholders • Updated and added new content & sections to the <i>Change Network</i> website <p>Key Upcoming Milestones:</p> <ul style="list-style-type: none"> • UWFT potential new timeline and program plan to re-launch communications and Config & Prototype • Kick-off <i>Leadership Engagment</i> plan with Provost, Sponsors and Program Advisory Team • Detailed plan for first UW wide <i>Town Hall</i> • Begin <i>What's Changing</i> communication campaign <p>Staffing Resources:</p> <ul style="list-style-type: none"> • Change Management team is staffed according to plan <p>Issues and Risksd</p> <ul style="list-style-type: none"> • RISK: If Process & System Design is not completed, it will impact our ability to finalize change impacts | | | | | | | | | | |
| Jeff Bishop, March 31, 2021 | | | | | | | | | | New |

Notes:

(B) Individual Program Pillars and Enterprise Remediation areas rated their own status, based on current state, and with the perspective that overall Program reset options are under consideration.

| Project Management | | | | | | | | | | |
|--|-------------|--------------|---------------------------------|---------------|-----------------|--------------|-----------------|---------------|-------------|------------|
| Project | Leader | Program Area | Overall Risk & Project Health * | Budget Rating | Schedule Rating | Scope Rating | Resource Rating | Issues Rating | Actual Cost | Budget |
| Project Management | Elise Barho | Program | 17 | 3 | 3 | 3 | 4 | 4 | | |
| <p>Overall Status: The PMO is making progress on establishing standard, consistent, and transparent planning, reporting, decision making, and change control. Consensus across the pillars has been reached to render program status in a dashboard / portal to provide a single landing spot for program status.</p> <p>Major Accomplishments:</p> <ul style="list-style-type: none"> • Significant progress made on the integrated schedule for the program • Significant progress made on the development of a single portal / dashboard for program reporting <p>Key Upcoming Milestones:</p> <ul style="list-style-type: none"> • Finalization of the integrated scope, schedule, and budget • Revisions and publication of new decision making and change control processes for the program <p>Staffing Resources:</p> <ul style="list-style-type: none"> • Work still remains on defining the relationship and interactions between the Enterprise Project Management Office (EPMO) and the Project Managers (PM) across the program • Strong, experienced Testing PM required to manage end-to-end testing <p>Issues and Risks:</p> <ul style="list-style-type: none"> • Testing should be independent of the Functional and Technical areas to provide a more holistic approach to end-to-end testing. • There are area of the overall program (schedule, scope, budget) that are at risk. This reporting is focused solely on the PM area which, independent of other areas, is in good shape, but is responsible for the oversight of the overall program. It is the opinion of the PM lead that the overall health of the program is, in the areas noted above, still a risk. | | | | | | | | | | |
| Elise Barho, April 13, 2021 | | | | | | | | | | New |

Notes:

(B) Individual Program Pillars and Enterprise Remediation areas rated their own status, based on current state, and with the perspective that overall Program reset options are under consideration.

UWFT Combined Program Executive Summary - 3/31/2021

| UW Medicine | | | | | | | | | | |
|---|----------------|--------------------|---------------------------------|---------------|-----------------|--------------|-----------------|---------------|-------------|--------|
| Project | Leader | Program Area | Overall Risk & Project Health * | Budget Rating | Schedule Rating | Scope Rating | Resource Rating | Issues Rating | Actual Cost | Budget |
| UW Medicine | Sarah Cantwell | Enterprise Systems | 24 | 5 | 5 | 5 | 4 | 5 | | |
| <p>OVERALL STATUS: The UWFT UW Medicine Program is currently in “Red” status due to the lack of complete requirements, open key design issues, and a lack of an integrated schedule across all UWFT Program activities (originally targeted for completion by 12/31/2020). UWM and other UWFT program teams are actively working to resolve remaining key design decisions and finalize requirements to allow UWM to baseline their project plans and integrate their plans into the overall UWFT Program.</p> <p>Major Accomplishments:</p> <ul style="list-style-type: none"> • Completed Architect Validation Stage (AVS) deliverables – Work Breakdown Structure (WBS), Staffing Plan, Assumptions • Prepared detailed analysis of staffing/budget for potential schedule extension • Completed System Design Approach (SDA) session focused on Point of Use; Kronos and Epic sessions have started • Started McKesson upgrade planning - assigned Lead and Project Manager • Reached 50% complete on classifying source systems requiring data conversion to Workday • Reached 60% complete on UW Medicine (UWM) extract gap remediation efforts for Build 1.5 • Assigned additional Business Analysts (BA) to help support design work (user stories & requirements) • Engaged with WMS team to understand current state support model – will help inform future state • Participated in Change Impact Review sessions with Change Management team • Provided input to Training Strategy for UWM <p>Key Upcoming Milestones:</p> <ul style="list-style-type: none"> • Close AVS – finalize scope, schedule budget • Expand BA support to include all UWM Information Technology Services (UWM ITS) requirements • Complete data extracts for tenant 2.0 • Complete DAWG-UWFT detailed project plan, charter, and requirements • Develop metrics to depict report dispositioning progress <p>Staffing Resources:</p> <ul style="list-style-type: none"> • Submitted staffing plan for potential schedule extension, along with detailed explanation of budget/costs • Recruiting for limited term FTE positions to replace contract resources (2 roles filled/18 opening between April-June) • Awaiting budget approval at close of AVS <p>Issues and Risks:</p> <ul style="list-style-type: none"> • Medicine earmarks in the FT budget may not be sufficient for the Medicine FT work • SDA need more design input prior to the larger planned meetings. Main use cases are undocumented or have never been collected. The Technical team needs these requirements to be able to proceed. • Financial Data Repository (FDR) (or alternative) solution was confirmed but implementation plan and ownership is needed to inform dependent tasks and resourcing needs. • Gap Application determination needed – Payroll Sub Ledger (PSL), ITS projects, Chain of Custody and Printing needs. Original target completion was 12/31/20 but remains open with the target completion extended based on revised timing from SDA approach. | | | | | | | | | | |
| Sarah Cantwell 4/6/2021 | | | | | | | | | | |

Notes:

(B) Individual Program Pillars and Enterprise Remediation areas rated their own status, based on current state, and with the perspective that overall Program reset options are under consideration.

UWFT Combined Program Executive Summary - 3/31/2021

| ORIS | | | | | | | | | | |
|--|-------------------|--------------------|---------------------------------|---------------|-----------------|--------------|-----------------|---------------|-------------|--------|
| Project | Leader | Program Area | Overall Risk & Project Health * | Budget Rating | Schedule Rating | Scope Rating | Resource Rating | Issues Rating | Actual Cost | Budget |
| ORIS | Diego Bartholomew | Enterprise Systems | 23 | 4 | 5 | 4 | 5 | 5 | | |
| <p>OVERALL STATUS: Without an extension for scope, schedule, and budget; the research administration part of FT is solidly RED.</p> <p>We have identified the following critical assumptions and dependencies and are monitoring and mitigating those along with risks and issues:</p> <ul style="list-style-type: none"> • 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) completed by WD and ASTRA by May 2022 • GA2C BP redesign finalized decisions by end of Design Sprint 5 • End-to-End (E2E) development & Timeline (July 2022 go-live date assumed some development past E2E) • An extension on scope, schedule, and budget will be approved <p>Note: some key dependencies for ongoing success in research administration continue to be deferred because of UWFT work (e.g. Enterprise Core Data Management (ECDM) & Unique Researcher ID (ORCID))</p> <p>Major Accomplishments:</p> <ul style="list-style-type: none"> • SAGE (ORIS) & IAM (UW-IT) joint proof of concept consuming Institutional Organization Structure (IOS) components from Workday Subtype attributes • ORIS Research Integration Platform has submitted data into a Workday tenant and received the data back • Created an integrated schedule with rest of UWFT Program for critical path • Engaged on with Organizational Change Management (OCM) on combined efforts on change management for both Workday and remediated systems • Significant advances on Grant Award to Close workflows and functional requirements for SAGE suite including completion of the System Design Approach (SDA) phase 1 deliverables <p>Key Upcoming Milestones:</p> <ul style="list-style-type: none"> • Decision on schedule extension and confirmation of integrated schedule, scope, and budget • E2E Testing Strategy • Advance budget is moving forward with a May release and a few releases targeted after May (UWFT dependency) • Analysis of FDR wave 1 design (FDM, Financial Budgets, Grant Budgets) analysis • Complete all extracts for conversion for tenant 2.0 and data remediation <p>Staffing Resources:</p> <ul style="list-style-type: none"> • Use of contractors has had a positive impact on staff resourcing by bringing in critical talents at a critical time <p>Issues and Risks (all issues and risks show improvements over the past quarter):</p> <ul style="list-style-type: none"> • The institutional decision to stop using the FIN ORG code without providing details on direct replacement is resulting in remediation efforts for SAGE, ASTRA, and eFECS • Critical decisions on system dispositions, business processes determination, and where work will occur outstanding • ORIS operational needs and requirements continue to exist • Overlapping scheduling and divergent work requests continue • Lack of integration infrastructure delays research administration integrations <p>Diego Bartholomew, April 14, 2021</p> | | | | | | | | | | |

Notes:

(B) Individual Program Pillars and Enterprise Remediation areas rated their own status, based on current state, and with the perspective that overall Program reset options are under consideration.

| Finance Readiness Program | | | | | | | | | | |
|--|--------------------|--------------------|---------------------------------|---------------|-----------------|--------------|-----------------|---------------|-------------|--------|
| Project | Leader | Program Area | Overall Risk & Project Health * | Budget Rating | Schedule Rating | Scope Rating | Resource Rating | Issues Rating | Actual Cost | Budget |
| Finance Readiness Program | Jeanne Marie Isola | Enterprise Systems | 24 | 5 | 5 | 5 | 5 | 4 | | |
| <p>OVERALL STATUS: FRP has continued on its planned path with sizing, prioritizing, and grouping of all remediation, gap, and retirement projects for the program in order to determine the scope, schedule, and budget requirements for the program. It is evident that the initial timeline and funding for the program will not be sufficient to complete the remediation of critical systems including retirements needed before go-live. FRP has also been working to build out and solidify the tools, processes, and methodology for completing all projects in upcoming sprints. Operational readiness has been working closely with the OCM team and Op Model teams to ensure E2E processes are covered and clearly communicated, paying particular attention to impacts to UW finance as well as noting gaps along the way. Focus in the coming months will be on obtaining adequate resources as well as project timeline.</p> <p>Major Accomplishments:</p> <ul style="list-style-type: none"> • Completed Work Breakdown Structure (WBS) for Financial Data Repository (FRP) to 70% confidence in current scope and assuming a potential schedule extension. • Identified resource requirements and timing submitted in resource plan V3. • Completed all system disposition, sizing and prioritization work. • Completed initial entry of FRP WBS into FT WBS. • Hired and onboarded 33 FTE's. <p>Key Upcoming Milestones:</p> <ul style="list-style-type: none"> • Refine scope, schedule and budget for remediation and retirement projects. • Hire and onboard resources required to execute the FRP projects. • Finalizing and finishing the development of the Project Managemetn tools. <p>Staffing Resources:</p> <ul style="list-style-type: none"> • Continuing to recruit on V2 Resource plan; submitted V3 resource plan • Requesting approval for hire of V3 positions on an ad hoc basis <p>Issues and Risks:</p> <ul style="list-style-type: none"> • Operating Model impacts to academy and enterprise not defined until fall of 2021 • Level of resources required to support remediation and retirement of 162 UW Finance systems may be higher than available funding • Integrated plan schedule for UW Finance dependent upon further refinement of resource requirements | | | | | | | | | | |
| <p><i>Tiffany Quatmann April 12, 2021</i></p> | | | | | | | | | | |

Notes:

(B) Individual Program Pillars and Enterprise Remediation areas rated their own status, based on current state, and with the perspective that overall Program reset options are under consideration.

UWFT Combined Program Executive Summary - 3/31/2021

| Integrated Service Center | | | | | | | | | | |
|--|--------------|--------------------|---------------------------------|---------------|-----------------|--------------|-----------------|---------------|-------------|------------|
| Project | Leader | Program Area | Overall Risk & Project Health * | Budget Rating | Schedule Rating | Scope Rating | Resource Rating | Issues Rating | Actual Cost | Budget |
| Integrated Service Center | Greg Koester | Enterprise Systems | 20 | 5 | 4 | 4 | 4 | 3 | | |
| <p>OVERALL STATUS: The ISC is red primarily due to inability to plan and resource for the FT work and impacts. ISC looks forward to a timeline mapped to deliverables with dates, milestones and resources for the HCM remediation work and a horizontal finance Business Process pilot with campus customers.</p> <p>Major Accomplishments:</p> <ul style="list-style-type: none"> ISC Subject Matter Experts participation helped identify several issues and risks, and helped find solutions, related to several payroll impacting items (effort reporting and payroll accounting adjustments) <p>Key Upcoming Milestones:</p> <ul style="list-style-type: none"> Waiting to receive from HRP Remediation a timeline with dates, milestones, and resources needed from ISC mapped to deliverables Finalization of full Operating Model design and better understanding of subsequent impacts to Workday support model for ISC and other key stakeholders <p>Staffing Resources:</p> <ul style="list-style-type: none"> Two of the requested FT backfilled positions (funded by Finance) have been approved and are now open <p>Issues and Risks:</p> <ul style="list-style-type: none"> ISC not consistently being included at the right time in decision-making that is critical to the design of the workday configuration, current change control approach and operating model Lack of resources; schedule unknown; inability to plan with other work. | | | | | | | | | | |
| Greg Koester 04/12/21 | | | | | | | | | | New |

Notes:




(B) Individual Program Pillars and Enterprise Remediation areas rated their own status, based on current state, and with the perspective that overall Program reset options are under consideration.

UWFT Combined Program Executive Summary - 3/31/2021

| UW-IT | | | | | | | | | | |
|--|------------|--------------------|---------------------------------|---------------|-----------------|--------------|-----------------|---------------|-------------|--------|
| Project | Leader | Program Area | Overall Risk & Project Health * | Budget Rating | Schedule Rating | Scope Rating | Resource Rating | Issues Rating | Actual Cost | Budget |
| UW-IT | Rob McDade | Enterprise Systems | 23 | 5 | 4 | 4 | 5 | 5 | | |
| <p>OVERALL STATUS: UW-IT's work for the FT program, which consists of key Finance systems and other impacted core enterprise systems (Student Database, Identity & Access Management, IT Service Management, Enterprise Web Services, and Enterprise Data Warehouse) remains in RED status. The primary gaps that persist are: lack of sufficient information from FT/business owners to complete designs; ongoing challenges securing and retaining sufficiently experienced resources; alignment doesn't yet exist around the FT reporting strategy, approach and requirements. For major requirement gaps, it is likely that Gap Applications will be needed to bridge the various systems (e.g. Student System & Workday for TA/RA waivers), but work on these possibly complex systems has not started and the team responsible for Gap Applications is understaffed.</p> <p>Major Accomplishments:</p> <ul style="list-style-type: none"> • IAM & SAGE joint proof of concept consuming Institutional Organization Structure (IOS) components from Workday Subtype attributes • Entelligence confirmed their ability to utilize Enterprise Data Warehouse's (EDW) Extract, Transform, Load framework to build their Data and Business Vaults during engagement on Finance Data Repository (FDR) pipeline <p>Key Upcoming Milestones:</p> <ul style="list-style-type: none"> • EDW's new Operational Data Store (UWODS) release 2 • Completion of System Design sessions / integrations requirements finalization • FDR Wave 1 (Financial Data Model Journals, Financial Budgets, Grant Budgets) Design Complete <p>Staffing Resources:</p> <ul style="list-style-type: none"> • Loss of Full Stack Dev resources limiting throughput in Enterprise Web Services • Still hiring key IT Finance support staff for some work areas <p>Issues and Risks:</p> <ul style="list-style-type: none"> • Numerous dependencies on FT work and decisions which are preventing significant progress by UW-IT in technical arenas. • Operating Model for FT has not yet been determined / communicated and this will impact several technical services. • Process to align on the need for, and commitment to building Gap Applications is not clearly defined. • 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 FDR project). | | | | | | | | | | |
| Rob McDade, 07-Apr-2021 | | | | | | | | | | |

Notes:

(B) Individual Program Pillars and Enterprise Remediation areas rated their own status, based on current state, and with the perspective that overall Program reset options are under consideration.

| * Oversight Level Key | ** Project Health Key |
|--|--|
| <p>1. Overseen by UW management and staff. Requires OCIO approval and reporting if over delegated authority.</p> |  Project is on time, on budget, and within defined scope, with minimal issues. Overall Risk Rating where 5-10 is Green |
| <p>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.</p> |  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 |
| <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> |  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 scales below to rate current performance on Schedule, Scope and Budget (select appropriate number for each)... |
| Budget, Schedule, Scope | <ul style="list-style-type: none"> 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 |
| Resources | People with the necessary expertise are.... <ul style="list-style-type: none"> 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. |

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|---|--|
| 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 | <ul style="list-style-type: none"> 1 = No risks or issues identified at this time 2 = Some identified but minor, no impacts anticipated 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 |