UW Enterprise IT Projects

Project Portfolio Executive Summary - Mar 31, 2020

Project	Sponsor	Oversight Level *	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
UW Finance Transformation Implementation	Mark Richards	3 - OCIO	Yellow (A)	Green	Yellow	Green	Yellow	Yellow	$35,236,000	$269,247,000
Destination: One	Tim Dellit	3 - UW	Yellow ↓ (B)	Yellow ↓	Green ↑	Green	Green ↓	Yellow	$70,415,000	$159,500,000
Advancement CRM Replacement	Julie Brown / Dan Peterson	3 - OCIO	Yellow ↑ (C)	Green	Yellow	Green	Green	Green ↑	$1,385,000	$4,000,000
Clinical Trials Management System	John Slattery	2 - UW	Green	Green	Green	Green	Green	Green	$9,546,000	$15,704,000
Northwest Hospital HR & Labor Integration	Nicki McCraw	2 - UW	Green ↑ Final	Green ↑	Green	Green	Green ↑	Green ↑	$10,991,000	$14,974,000
UWM Data Analytics Warehouse	Adam Wilcox	2 - UW	Yellow new	Green	Green	Green	Yellow	Yellow	$1,015,000	$5,172,000
LQI Leases	Susan Camber	2 - UW	Green new	Green	Green	Green	Green	Green	$212,000	$540,000
F&A Space	Sue Camber	2 - UW	Green ↑ (D)	Green ↑	Yellow ↑	Green	Green ↑	Green ↑	$50,000	$246,000
Transportation System Improvement Project	John Chapman	1 - UW	Green	Green	Green	Green	Green	Green	$3,144,000	$3,371,000
Finance E-Commerce/Touchnet	Brian McCartan	1 - UW	Green	Green	Green	Green ↑	Yellow ↓	Green	$306,000	$1,000,000
Audit/Complaince of Unstructured Network Data	Xiao-Ping Chen	1 - UW	Green ↑	Green	Green ↑	Green	Green	Green	$57,000	$60,000

11 projects

$132.4M	$473.8M

Notes:

(A) FT Implementation started Stage 2 in January; this resets the prior ratings from Stage 1. Note that total Budget and Actual Cost includes both stages to show total investment approved by Board of Regents and State OCIO.

(B) D:1 leadership determined that a three month extension for go-live date is necessary, which will ensure enough time for robust testing.

(C) Advancement leadership approved a plan to rebaseline the project, with 2021 go live extended by four months.

(D) F&A determined that InVision solution available through UW Facilities Services will provided the needed functionality through a planned InVision enhancement; that collaborative work will be reflected in June report.

(over for Program Operations impacts)

↑ Improvement over previous quarter   ↓ Setback from previous quarter

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	🟢	• Number one priority is COVID-19. Significant effort has gone into updating Workday for new state/federal leave and tax provisions. • For the quarter starting April 1 thru June 30 we are implementing a new approach for Workday changes with both HR partners (AHR and UW-HR) contributing input to a shared priority list and planning the prioritized work against resource capacity. The quarterly priorities and timing are transparent to our shared customers. This is consistent with what was reviewed with partners and customers at the most recent HCM Workday Governance meeting. COVID-19 caused a temporary reprioritization. • Neighborhood Clinics Project launched, a revised resource approach has been proposed given resource constraints with multiple projects. We are on track for the initial phase given we have resource assistance from Huron (brings the knowledge and experience of NWH project, which had a successful go live on January 1st). • We have several key technical openings due to people moving to FT roles and are working on plans to address. We are approaching a higher volume time of the academic year for the ISC and Unit administrators. • Working with UWFT on an engagement model focusing upon HCM remediation. • Do have concerns about resources looking forward as multiple projects ramp up.
UW-IT	Aaron Powell	UW Enterprise	🟡	• UW-IT focused on COVID-19 response and maintaining essential university operations, impacts projects. Current Major Projects UW-IT is engaged in: UWFT, Advancement CRM, UW Neighborhood Clinic integration to UW Medicine, D:1. • UW-IT staffing up new Program (ITF) to handle UW-IT's work on UWFT, reporting directly to the CIO. Hiring has slowed down due to COVID-19. UWFT schedule not yet integrated with IT partners, making the feasibility of the planned UWFT schedule unknown. Some concern around key UW-IT and campus staff joining UWFT and how this may impact ability to maintain current financial systems. There is potential for risks to become critical in next few months. • Advancement CRM schedule re-baselined and UW-IT deliverables and timelines defined. Risk is that scope continues to shift. COVID-19 impacts likely in some but not all areas of UW-IT work on this project. • UW Neighborhood Clinic Project just beginning, impact to UW-IT expected to be fairly minimal, due to re-use of solution developed for NWH Project.

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* 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**

Completed Projects - Mar 31, 2020					
Project	Sponsor	Oversight Level*	Go Live Date	Project Completion Date	Total Project Cost ($K)
Finance Transformation Readiness	Mark Richards	3 - OCIO	n/a	transitioned to UW FT	absorbed into UW FT Budget
Pharmacy Inventory Management System	Shabir Somani	2 - UW	Final: Sep, 2019	Dec, 2019	$14,619,000
HFS Point of Sale	Pam Schreiber	2 - UW	Final: Nov, 2019	Nov, 2019	$755,000
ICA Group Sales	Erik Jones	1 - UW	Final: Oct, 2019	Dec, 2019	no costs - level of staff effort only

UW Finance Transformation Implementation

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
UW Finance Transformation	Mark Richards	3 - OCIO	13	1	3	2	3	4	$35,236,000	$269,247,000

Summary – The UWFT Program in January launched our Plan Stage which ran through the end of February. In March we kicked off our Architect Stage, along with quickly pivoting to embrace the shift to an entirely remote operation. Our team and the many stakeholders around the University remain committed to seeing this work proceed; along with building a contingency plan in response to COVID-19 as March arrived. The Program remains on track to meet all deliverables for the Architect stage. Progress continues.
Note: cost figures are for Stage 1 (Readilness) and Stage 2 (Implementation) combined.

Top deliverables completed for Plan include:
• Process Transformation Teams onboarded
• 90% + of planned program hires onboarded through February
• Workday Foundation tenant built; Implemented new governance structure
• Change management and communications strategy completed
• Program Management Plan and Program Charter Finalized
• Program Schedule 95% complete
• Tenant Management Strategy completed
• All program management tools deployed (i.e. Jira, Smartsheets, SharePoint).

Key expectations for Architect phase include:
• Business Process & Configuration workbooks
• Configuration Tenant – 75% overall completion
• Integration specifications
• Conversion process in place
• SDB remediation approach finalized
• ServiceNow approach finalized
• Translator – 75% built
• Middleware approach finalized
• Reporting Strategy/MDM Strategy completed
• Final decision on Recruiting Implementation
• Change Network onboarded

Accomplishments of Architect progress made include:
• Successfully launched the Process Design Workshop series, which will go on throughout the spring and summer
• Stood up the OCM Advisory Group and the Unit Readiness Leads, with strong representation at kick-off meetings for both groups
• Continued to make progress on our steep hiring ramp, nearly reaching some extremely aggressive goals in March, and successfully implementing a remote onboarding process for our new teammates (see attached updated org chart); We are actively exploring ideas to support the equally aggressive hiring ramp for our partners, including hiring of an external recruiter
• Further developed the contingency plans to include resource succession planning
• Continued engagement with key stakeholders throughout the University, including meeting with the Board of Deans and Chancellors to update on our progress and request suggestions for membership of our Faculty Advisory Group
• Received a new QA Report from Bluecrane, highlighting the many strides the program has made, including that "in March, the Program made significant strides in reducing its risks in three key areas --- preparing a more detailed schedule, developing a path forward for addressing technical readiness, and sharing more information on business process design"
• Met the OCIO Investment Plan condition to provide the integrated project schedule, including a review of UW systems remediations and integrations

Architect Exit Criteria:
• Configuration Workbooks complete
• Business Process Workbooks complete
• Configuration tenant built
• Integration specifications complete
• Conversion process in place
• Reporting strategy complete
• HRP remediation catalog validated
• Local vs. Shared activities finalized

Top Risks/Issues:
• As resources are diverted to COVID-19 response and employees are impacted by sickness/family care, there may be a strain on utilization.

• If program resources aren't hired according to plan, we may not be able to meet all Program deliverables.

• UW Legacy Org Structure; If a decision is made to continue to use this structure that sits in FAS and rebuild this in Workday, there will be an impact to scope / schedule.

• If Program Sponsors are not aligned and supportive of the future state solution, there is a risk of broader adoption.

Contingency/Mitigation Plan:
• COVID-19 Program Contingency and succession plan developed to ensure proxy backups defined and supplemental recruiting process was shared with key unit partners for mitigation planning as needed.

• Formal vendor and talent management strategies developed.
• Streamlining recruitment and onboarding process developed.

• Org Structure mitigation plan in process.

• Sponsor alignment being monitored through Architect stage.

per Ed Loftus (Stephanie Cady) 4/15/20

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**	12	3	2	2	2	3	$70,415,000	$159,500,000

Status (as of 4/9, allowing for project re-alignment made in early April):
Due to COVID-19, it has been determined that the D:1 go-live date should move from 10/3 to 1/30 because of the refocus of UW staff on controlling the COVID-19 situation. As a result, replanning of of the timeline is currently taking place to be complete by 4/26. Functional Testing Status remains incomplete with 10% still outstanding. Integrated testing will now begin on 5/11 due to the new go-live date. This will allow the teams to revalidate D1 scope with operational leadership.

Risks
1. Training Approach: identifying testing rooms continues to be an issue for the program. With the moved go-live date, there is now more of an opportunity to explore in person training options as well as virtual options to alleviate the need for actual room space
2. Testing Approach: testing has remained behind but with the new go-live, the program has been able to sequence events so there are now several weeks of validation of scope with operations and 7 rounds of integrated testing ensuring extremely robust testing.

High Level Timeline:
 • Groundwork Phase - Oct-Nov '18 - COMPLETE
 • Discovery Phase - Dec '18-Jan '19 - COMPLETE
 • Adoption Phase - Jan-Oct '19 - COMPLETE
 • Testing Phase - Nov '19-Oct '20 - ONGOING
 • Training & Go-Live Phase - Sept-Jan '21
 • Post-Live & Stabilization Phase - Feb '21-Jul '21

per Rich Selenis 4/15/20 <data from Emily Schulte>

Notes:

(B) D:1 leadership determined that a three month extension for go-live date is necessary, which will ensure enough time for robust testing.

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	$1,385,197	$4,000,000

OVERALL STATUS:
• Get to green plan (ETA: 4/30/20)
• Final demo to subject matter experts is in progress for Phase 1 (Prospect Development). Targeting completion by April 10th.
• Development/configuration completed for Phase 2 (Sprint 4).
• Development/configuration in progress for Phase 2 (Sprint 5 and 6). Final demo targeting April 17th & April 20th.
• The rebaseline plan was reviewed and approved by the Executive Steering Committee on 03/30/20. The rebaseline plan included a solution delivery date (3/30/21) and a go-live date (11/1/21).

SCHEDULE:
• xRM closed out all items identified by the BA team in the fixes document for Phase 1 (Prospect Development) and Phase 2 (Sprint 4 – Funds). There are still outstanding items for Sprint 5 and 6. Team is targeting to close them out and do a final demo on April 17th and April 20th before moving to testing.

REQUIREMENTS:
Requirements gathering in progress with stakeholders for:
• Phase 3a: Bio: Sprint 015 Other IDs/Relationships
• Phase 4: Membership

DEVELOPMENT/CONFIGURATION:
• Conducted out-of-the-box demo for Sprint 017 Pledges.
• Working sessions with BA team for Sprint 007 Spousal Relationships/Deceasing to get to a demo-ready state.
• Conducted a two-day final demo for Phase 1: Prospect Development. Two more meetings have been scheduled to wrap this up.

SYSTEM INTEGRATION:
• Advancement met with UW-IT on 2/5/20 and reviewed their proposed solution to develop a notification queue that will contain record changes. UW-IT estimated this work to be six to nine months starting now, which works for Advancement's timeline. UW-IT PM has scheduled a quarterly check-in to monitor work.
• Advancement received updates on Workday Financial Transformation and its impacts on current integrations with the FAS system. Workday Financial Project is still in the early phases of requirements and design analysis.

PROJECT BUDGET:
• Project is under budget and do not expect to exceed by go-live.

Per Julie Ngo 04/07/2020

Notes:
(C) Advancement leadership approved a plan to rebaseline the project, with 2021 go live extended by four months.

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	$9,546,000	$15,704,000

Status:
Target 3 (T3) detailed design has been completed and approved by the CTMS Executive Steering Committee (ESC) per the target date of March 1, 2020. Highlights of design journey to-date:
• T3 kick off occurred Sep 25, 2019
• 50+ Working Group meetings to develop proposed designs for Design & Adoption Advisory Group (DAAG) review between Sep & Feb
• 15+ 1-hour meetings of the pre and post award DAAG groups between Oct and end of Feb
• Sponsor Invoicing subgroup came together to develop and SBAR recommendation for a "situation specific model" for sponsor invoicing
• Two All-Day DAAG Sessions covering Target 3 workflows comprehensively using design summaries and step-by-step walkthroughs in OnCore (vendor)
• Final Design Summary Deck published Feb 28
• CTMS ESC Approved T3 design & Sponsor Invoicing SBAR Recommendation during March 20 ESC meeting
 • A 50+ team participated in a March 25 Design Validation session where 6 studies built per the documented design were reviewed with DAAG members

Key Activity:
Executive sponsors are revising the overarching Memorandum of Agreement between the Fred Hutch, the SCCA, and UW, with multiple agreements focused on:
    a) remainder of the project,
    b) CTMS operations, and
    c) CTMS "parallel office" functions (performed by UW Clinical Trials Office, Fred Hutch Clinical Research Support Office, and SCCA Research Integration Office) that will support clinical trial operations enabled by the CTMS. Drafts of documents are under review and timeline for finalization is being determined.

Upcoming Major Milestone:
Targeting build & testing complete by Oct 31, 2020.

Project Risks:
Project team working 100% remote due to COVID-19 related work from home policies. While currently team is on-track with all project plan items, CTMS Steering Committee & ESC are closely reviewing any impacts/adjustments needed to Target 3 milestones on account of macro-level conditions

per Rich Selenis 4/15/20 <data provided by Ganga Subramanian>

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	7	1	2	2	1	1	$10,991,000	$14,974,000

Status:
The integration occurred on 1/1/20 on schedule and transition to operations occurred on 1/17/20. Some wind-up effort related to contract closure and audit preparations continues through the end of June.

Project Budget:
Overall, the project is running under budget through February 2020 and is forecasted to be under budget through the end of the wind-up phase.

Per Ryan Markowski 04/15/20

Final

UWM Data Analytics Warehouse

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Issues Rating	Actual Cost	Budget
UWM Data Analytics Warehouse	Adam Wilcox	2 - UW	11	1	2	1	3	4	$1,015,000	$5,172,000

Project Overview:
DAWG (Data Analytics Galaxy Warehouse) project is a new development of UW Medicine's analytics platform with new modern infrastructure, enablement tools, and training curriculum to promote adoption. DAWG will replace the current Enterprise Data Warehouse (EDW) and Amalga. The three major components of the new platform are:
 • DASH (Data Analytics Store House), the enterprise data repository containing legacy data from retiring systems, Epic data via Clarity, and data feeds from active non-Epic systems.
 • DEEP (Data Exchange Enterprise Platform), the curated data platform, where many systems are integrated and transformed for easier reporting and single source of truth.
 • DAWN (Data Analytics Whole Navigator) intersects both DASH and DEEP and encompasses overarching data stewardship, metadata and master data management and data quality

Status:
Phase 1: Clinical Systems – aligned with D:1 (Target Go-Live of March 5, 2021)
 • DASH:
   • Active Data Feeds - Complete
   • Initiated capacity planning for retiring systems
 • DEEP:
   • Core data model build with key Epic elements complete; build 90% complete for 5/11 milestone
   • Application data mapping ongoing
   • Key users validating build to date
 • Infrastructure
   • Adopted architecture plan
   • Test environment build complete
 • Enablement:
   • Initial data dictionary developed
   • Developed training plan and initial curriculum
Phase 2: Financial Systems (Target Go-live July 1, 2022)
Phase 3: Other Systems: (Target Go-Live April 28, 2023)

Risks:
• Resources – several open positions and resource being pulled to help with COVID-19 response
• Emergent changes in Epic and ORCA due to COVID-19 must be integrated into D:1, which will impact the flow of data into DAWG. The need for real-time data in the DAWG is being reevaluated.

per Kirsten Haynes and Rich Selenis on 4/15/20

new

LQI Leases										
Project	**Sponsor**	**Oversight Level***	**Overall Risk & Project Health ***	**Budget Rating**	**Schedule Rating**	**Scope Rating**	**Resource Rating**	**Issues Rating**	**Actual Cost**	**Budget**
LQI Leases	Susan Camber	**2 - UW**	8	2	2	2	1	1	$212,000	$540,000

Status:
Project remains on track. We're largely through the assessment/discovery phase of the project and the data collection and future state design phases are well underway. Next big milestones include 1) populating the lease software with some test leases and 2) presenting our lease discovery approach to KPMG.

Budget estimate is +/-10% ($480-600K).

Stephen Brady   4/15/2020   ***new***

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**	10	2	3	2	2	1	$49,500	$246,000

Status:
The F&A space project has been alligned with the GeoSIMs to InVision migration project by mergering the PM position to oversee both projects. This stragegic decision has been made due to the powerful synergies and symbiotic relationship between these two efforts. The migration from GeoSIMs to InVision for the space database system of record will provide the University community a robust platform and may support multiple adidtional capabilities to the Campus. For the F&A Space project, combining these projects directly addresses several of the pain points identified by Campus after the last rate proposal. The new InVision system will more readily facilitate current and accurate space data, a common and user friendly interface, and will provide data fields for the information required to complete the space survey for the F&A rate proposal.

Per Colleen Bettis 04/10/2020

Notes:

(D) F&A determined that InVision solution available through UW Facilities Services will provided the needed functionality through a planned InVision enhancement; that collaborative work will be reflected in June report.

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	$3,371,300

Status:
Permit configuration into T2 Flex system ongoing. "Go Live" date extended to September due to COVID-19 related impacts.

Eric Johnson 4/15/20

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	10	2	2	1	3	2	$305,588	$1,000,000

E-commerce is broadly defined as exchanging money for goods and/or services over the Internet. For our purposes, E-commerce is a program that will allow the Office of Merchant Services (OMS) that has three core functions: building online storefronts on behalf of our merchants in a PCI Compliant manner; consolidate third party vendor payment systems through the TouchNet Ready Partner Program; and create integrations with exisiting systems that remove University networks from PCI Compliance scope.

Status:
• Met with UW-IT to expand scope from TouchNet implementation to overall e-commerce program

January 1 – March 31 2020:
• TouchNet Transactions:2,525
• TouchNet Volume:$384,347

Updated TouchNet site numbers through March 31,2020:
• MarketPlace Mall: 6 stores
• Single Stores (not linked on Mall): 2 stores
• uPay sites: 3
• Cvent integrations: 9
• New sites vs replacement: 10 new sites/10 replacements of insecure or unauthorized sites

Upcoming Milestones:
• Completion of Heartland Payment Services (HPS) contract
• Acceptance of ACH electronic check payments
• Begin process of onboarding tuition to new e-commerce platform

Project Risks:
• Open position – slated for 50% work on e-commerce
• COVID19 impacts
• Priority shifted to complete HPS to allow merchants to accept electronic checks via the web
• Expecting more web traffic while this persists
• On site assessments on hold limiting discovery of unauthorized vendors

Budget:
• Original budget estimate of $1,000,000 did not include FTE time this would increase budget amount by $150,000 annually or $750,000 over 5 years

Per Gordon Scherer/Kevin Doar 4/9/2020

Audit/Complaince of Unstructured Network Data										
Project	**Sponsor**	**Oversight Level***	**Overall Risk & Project Health ***	**Budget Rating**	**Schedule Rating**	**Scope Rating**	**Resource Rating**	**Issues Rating**	**Actual Cost**	**Budget**
Audit/Complaince of Unstructured Network Data	Xiao-Ping Chen	1 - UW	9	2	2	2	1	2	$57,167	$60,000

Status:

Project remains on track. We have completed software configuration with the vendor. Online training for staff is our next milestone, and should be completed by June, 2020. One risk/challenge has been identified and resolved. We were not initially able to resolve IDs of accounts from the NetID domain. The vendor identified a workaround, and we are in the process of testing it. Initial results are promising, and we believe the issue will be closed. The only open issue is our response to the Office of Privacy, whose advice to us was to manually search 20 years of file storage to identify PII. As doing that programmatically is exactly the purpose of this software, we won't be doing that, but rather will accept the risk as less than the risk of continuing with the unquantified risk of having this data on our network.

Actual Cost and Total Budget adjusted to include labor costs.

Jeff Balaz & Mick Westrick   3/31/20

Completed Projects Summary - Mar 31, 2020

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ICA Group Sales	Erik Jones	1 - UW	Final: Oct, 2019	Dec , 2019	no costs - level of staff effort only

* Oversight Level Key	** Project Health Key
1. Overseen by UW management and staff. Requires OCIO approval and reporting if over delegated authority.	⬤ (green) 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.
	⬤ (yellow) 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.	⬤ (red) 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