Project Portfolio Executive Summary for November 2014

BusinessObjects Enterprise (BOE) Migration, Epic Enterprise Specialty Implementation, and Mainframe Platform Technology Refresh projects were successfully completed. Pharmacy Inventory Management System project has begun and is now reporting status to the IT Strategy Board.

UW Enterprise Projects

Projects - Green	Sponsor	Oversight Level *	Project Health **	Overall Risk Rating ***	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (Project Life)	Budget (Project Life)
Enterprise Document Management System Implementation	Gary Quarfoth Ann Anderson	2 - OCIO	Green	8	2	2	2	2	$4,642,752	$5,361,192

Project Status:

1) Staffing Risk: Our finalist QA candidate did not pass the final round of interviews, so we are pulling the open position and will be re-working it in October. We are also losing our contracted resource.

2) Impact: As we move into our next round of implementations, we will be stretched beyond our ability to support program, project and support at current levels.

3) Risk Mitigation activities to address staffing risk:

A) We are working on a new permanent staffing plan and will be sharing it with executive sponsors in November.
B) We are re-assessing how to best use our open, vacant position and how to best recruit for it.
C) We will share a plan with our Sponsors for augmentation of our current staff with contract resources to support the January implementations, and discuss the budget implications, to determine the best next steps.

Program Activities

- Our draft engagement methodology has been shared with all of our sponsors and with key extended stakeholders, and we've gained approval to continue with the trajectory we have defined. We are currently working out a staffing and cost recovery plan.
- We are currently in final stages of contract negotiation with a new pool of Oracle WebCenter vendors, which will significantly reduce both the cost of future implementations and the risks associated with the implementations, because of the higher quality and diversity of the new vendor pool.
- We have successfully worked out contract language with Oracle, to transition from limited-use licensing to full-use licensing, and are working in early November to finalize.
- We are working with the OCIO to assess our security risks and our compliance with UW policies. We have drafted a SOW to define the work required and set expectations for timing and effort, and are currently working out next steps.
- We continue to learn more about working with our service partners in UW-IT. We've implemented an operations plan, and we're working with partners to put a new monitoring strategy and other communication tools in place, to mitigate risk around change management for these underlying services.

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Production Support and Release Management

- We completed our September release, which included implementation of new automation and defaulting for the GCA team. We are currently transitioning to a quarterly goal-setting cadence, guided by goal setting work we did with our CAB.

Next Round of Pilots – Discovery

- We are aligning with the Lean culture in Facilities to complete our discovery work to replace the current content repository of building documents.
- We have also started discovery efforts for Procurement Services and Student Fiscal Services.
- We plan to have implementation recommendations for all three departments by the end of the year.

Projects - Green	Sponsor	Oversight Level *	Project Health **	Overall Risk Rating ***	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (Project Life)	Budget (Project Life)
Mainframe Platform Technology Refresh	Kelli Trosvig	1 - UW	Green	8	2	2	2	2	$6,523,074	$6,600,000

Project Status: This project is complete. Replacement of the Unisys MCP mainframe computers for UW Information Technology's 4545 (Seattle) and TierPoint (Spokane) data centers. The UW's administrative computing requirements are met through a distributed architecture consisting of core transaction and batch processing Unisys MCP systems with complimentary processes on Windows and Linux Servers. The existing Unisys MCP Libra 690's have been replaced with Unisys MCP Libra 4390 servers. Expected life span in 6-8 years. Cost includes hardware, software licensing, mainframe system and maintenance agreements.

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Projects - Green	Sponsor	Oversight Level *	Project Health **	Overall Risk Rating ***	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (Project Life)	Budget (Project Life)
HR/Payroll Modernization	V'Ella Warren Mindy Kornberg Cheryl Cameron Lori Mitchell	3 - OCIO	Green	9	2	2	2	3	$10,929,359	$67,464,473

Project Status: The Design phase is complete as of October 31, and the project status is currently green. In this phase, the majority of processes, interfaces, and data for Workday were defined to ensure that the new system will meet UW's specified requirements. Remaining items will be resolved early in the Configuration and Prototype phase.

The Configuration & Prototype phase began November 3 and will run through May 15, 2015. Objectives for this phase include:

1. Complete configuration and prototyping of system to ensure the system is ready for the Testing Phase
2. Complete loading and validation of Prototype 1 and Prototype 2 data
3. Complete development and unit test of integrations and reports
4. Inform and secure buy-in from the University community about the project, impacts, and preparedness activities
5. Complete preparations for the Test Phase
6. Identify recommended ongoing Operating Model

A significant issue for the project is that union negotiations are required regarding key design decisions or their impacts. Non-successful bargaining could impact the project schedule. Bargaining is slated to begin November 14, 2014, and is expected to be completed by the end of the first quarter 2015.

Noteworthy: Previous cost actuals indicated were for the procurement phase. The budget has been updated for the implementation portion of HR/Payroll Modernization.

Project Portfolio Executive Summary for November 2014

UW Medicine Projects

Projects - Green	Sponsor	Oversight Level *	Project Health **	Overall Risk Rating ***	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (Project Life)	Budget (Project Life)
BusinessObjects Enterprise (BOE) Migration	Lori Mitchell Maureen Hooley	2 - UW	Completed	9	1	2	3	3	$5,781,696	$7,214,088

Project Status: All three phases of the BusinessObjects Enterprise (BOE) Migration project have completed with over 700 legacy Cognos reports (spanning billing and clinical data) migrated to the new platform. Data foundation has also been developed to be leveraged for ongoing report migration as part of the operational effort.

Additionally, the governance structure (with both data owners and data stewards) as well as access processes and policies continue to ensure Epic data governance.

Pharmacy Inventory Management System	Shabir Somani	2 - UW	Green	8	1	2	2	3	$390,411	$6,941,089

Project Status: The PIMS project is currently in the Planning and Analysis phase. UW Medicine and TECSYS (system vendor) are working towards confirming and finalizing project scope, timeline, and resources.

Current major activities include:

- Continue documentation on current state UW Medicine Pharmacy processes
- Facilitate and participate in additional current state process review sessions with TECSYS
- Determine carousel ordering and installation schedule
- Confirm project resources and allocation
- Finalize current state interfaces documentation
- Initiate work on technical infrastructure
- Finalize project timeline, project plan, and charter

Upcoming major milestones include:

- Vendor (TECSYS) on-site analysis of current processes and business requirements 11/18/2014 - 11/20/2014

Major Risks/Issues:

- Issue - CareFusion Pyxis ES Upgrade: Upgrade required for Pyxis, dispensing system that will be integrated with inventory system in later stage of project. Potential challenge scheduling upgrade not to impact PIMS.
- Risk - Central user authentication preferred across the UW Medicine enterprise: Lack of enterprise authentication may have schedule impacts.
- Risk - Enterprise networking and network strategy for VMC: There would be a need to establish a dedicated UW Medicine connection to Valley Medical Center (VMC). May impact VMC PIMS implementation.
- Risk - Enterprise Freezes related to ICD-10: ICD-10 system freeze is forcing major activities into May/June, 2015. This volume of production system activities may impact a targeted June 2015 PIMS go-live for UWMC. Pharmacy executive leadership to agree on schedule impacts.

Note: The percent complete appears as 0% because the project is still in the planning and analysis phase, and has not yet conducted project kick-off.

Projects - Green	Sponsor	Oversight Level *	Project Health **	Overall Risk Rating ***	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (Project Life)	Budget (Project Life)
Epic Enterprise Specialty Implementation	Johnese Spisso James Fine	1 - UW	Completed	6	1	2	2	1	$34,980,000	$49,680,000

Project Status: The EESI Project was successfully implemented per original baseline plan on May 20, 2014.

Implementation Highlights:

- Application utilized without major issues. Primary issues experienced were user-level application security related.
- A quick-response team addressed challenging workflow issues (~10 separate issues).
- Command centers remained in place from May 16 through June 30, the formal project closure date.
- Project support team at go-live totaled over 300 staff and contract staff across 50 unique sites. Additionally, clinic operations provided expert users across all clinics.
- Clinic operational leadership actively engaged by daily meetings and distribution of daily status reports. Leadership provided with daily key performance indicators dashboard.
- Breadth of go-live impact:
  - 85 Clinics
  - 40 Specialties
  - 800+ Practitioners
  - 1,700+ Clinic Staff

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Projects – Complete	Sponsor	Oversight Level *	Monitor of Benefits/Value Realized
CHARMS: Project went live 8/1/10	Lori Mitchell	3 - OCIO	Biennial performance report due summer 2011
UW Medicine McKesson v15 Upgrade: Project went live 2/22/12	Paul Ishizuka	2 - OCIO	
ORCA Computerized Provider Order Entry (CPOE): Project went live 9/24/12	James Fine	3 - OCIO	

* 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. QA reporting required, maybe internal or external. OCIO may recommend project to be full 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	
Green	Project is on time, on budget, and within defined scope. **Overall Risk Rating where 4-9 is Green.**
Yellow	Changes to scope, budget, or resources have placed project at some risk. Project has the potential for delays or scope changes. **Overall Risk Rating where 10-14 is Yellow.**
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 15-20 is Red.**

Note for UW Medicine: project oversight levels 2 & 3 report to UW management

*** IT Project Risk Ratings	
Current Risk Rating	Use the scale below to rate current performance on **Budget**, **Schedule**, and **Scope** (select appropriate number for each)
Budget =	1 = Performing better than project plan; ahead by 5% or more
	2 = Performance is on plan
Schedule =	3 = Behind plan, but within 5% of original targets
	4 = Behind plan between 6% to 10% and likely to use/using contingency
Scope =	5 = Greater than 10% behind plan and more than half of contingency used
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
Issues =	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