

IST ANNUAL PLAN UPDATE

CTSC



July 2014



AGENDA

- Project List to Portfolio
- Work to Date and What's New
- Future Annual Report Framework
- IST Annual Plan
- Fall PMG Update



EVOLVING FROM LISTS...

Goals of 'Master Project List':

1. Provide accessible information
2. Demonstrate transparency
3. Facilitate accountability
4. Reduce project knowledge differentiation across teams
5. Provide strategic departmental value:
 - » List standardization: this list will be the authoritative list for all departmental projects
 - » Enhance efficiency: reduce duplication (resource efforts and number of reports produced)
 - » Support other IST activities (ex. Funding-Planning/Budgeting)
 - » Unify resources/stakeholders and facilitate collaboration across initiatives by developing a maintainable list



... TO AN IT PORTFOLIO



The Value of Project Portfolio Management (source: Braunack, EclipsePPM)



July 2014

IT PORTFOLIO BENEFITS

- **Enhance strategy alignment and fulfillment** by identifying and prioritizing projects most closely linked to the UW Strategic Plan (UWSP) and IT Strategic Plan (ITSP) objectives. (Indicator/Measurement: projects' strategic linkages will be supported by the Project Intake Process, indicated within standard PfS and PMO documentation and measured by portfolio optimization feedback from key stakeholders including leadership and project sponsors).
- **Enhance project throughput, ROI and success** by emphasizing efficiency and developing a pragmatic approach to managing the portfolio. (Indicator/Measurement: portfolio performance targets and metrics along with shared stakeholder feedback survey results.)
- **Enhance risk management** by supporting strategic business planning and audit processes for projects. (Indicator/Measurement: Disaster Recovery/Business Continuity Planning compliance ratings along with internal and external project audits.)
- **Improve process control** by establishing a standard methodology for PfS activities and implementing a governance framework that is used consistently for projects. (Indicator/Measurement: internal and external project audits.)
- **Improve skills** of all stakeholders involved in IST project delivery. (Indicator/Measurement: internal and external project audits and shared stakeholder feedback survey results.)
- **Enhance collaboration** within IST and the greater UW IT community by implementing a framework for Group communication. (Indicator/Measurement: PfS progress reports, portfolio performance targets and metrics along with shared stakeholder feedback survey results.)
- **Enhance IST team's professional reputation** within the UW IT community as a trusted and valuable resource for technology initiatives. (Indicator/Measurement: portfolio performance targets and metrics along with shared stakeholder feedback survey results.)



WORK TO DATE

- Jan 2014 –Revisited standard project-related definitions and identified areas of potential process development for managing projects within IST, drafted project intake process
- Feb 2014 –Analyzed “As Is” state of project listings and met with stakeholders to discuss project data requirements and portfolio Pfs reporting requirements
- Mar 2014 –Consolidated project listings to initial Master Project List and began adding project data to facilitate IST Annual Planning activities
- Apr/May/June 2014 – Consideration for what can be achieved based on priority, alignment, resources, budget, etc.; Baseline/Foundational

...	Launch of Portfolio & Strategy	The Portfolio and Strategy (Pfs) Launch Project is being initiated in response to the following drivers: <ul style="list-style-type: none"> • Audit Needs • Strategic Focus • Best Practices and Consistency • Public Sector Direction • Client Expectations • IT Initiative Issues: Unique Solutions and Effort Duplication or Gaps <p>The overall objective of launching the Portfolio and Strategy unit within the Portfolio Management Group of IST is to realize the benefit of overseeing a portfolio of related and unrelated IT projects in an organizational context; with identifiable and measurable linkages between projects and strategy fulfillment.</p>	Yes	Build collaborative relationships with our users and each other (OC4),Define IT accountabilities, responsibilities and authorities, available resources, and supports, and clearly communicate this to our users (IP2),Take a University-wide perspective to IT (OC2)	High/Medium -Highly Important (Strategically- or Operationally-Driven including Faculty/Departmental/Program Initiatives)	Large (> 100 hours of IST effort)
...	PPM Tool Acquisition	This project will assess current tools for portfolio, program, and project (PPM) management, determine requirements for a tool set going forward, acquire a tool set and implement a tool set.	Yes	Understand the needs of our users (IP1),Empower users and optimize their experience (U1),Make the necessary technology infrastructure and resource investments (RM1)	High/Medium -Highly Important (Strategically- or Operationally-Driven including Faculty/Departmental/Program Initiatives)	Large (> 100 hours of IST effort)
...	Master Project List	There are many sources of IST project or related information, including the IST Web pages, the IST Management SharePoint site, various lists within the project teams, and other SharePoint sites, to name a few. The information that is collected is often out of date, is inconsistent between sites or is just not accessible. Creating this list is a priority for IST and will be used as a	Yes	Build collaborative relationships with our users and each other (OC4),Define IT accountabilities, responsibilities and authorities, available resources, and supports, and clearly communicate this to our users (IP2),Take a University-wide perspective to IT (OC2)	High/Medium -Highly Important (Strategically- or Operationally-Driven including Faculty/Departmental/Program Initiatives)	Large (> 100 hours of IST effort)

ANNUAL PLAN UPDATES

- Consultation with functional and other partners
- Added in new filters, i.e., top six strategic objectives, budget & resources



ANNUAL REPORT FRAMEWORK

Exec Summary

- » CIO Remarks

About IST

- » Current Statistics
- » Key Performance Metrics
- » Aligning with Strategy

Year in Review

- » Project Goals and Results
- » Operational Activities
- » Risk and Audit
- » Other Key Activities

The Year Ahead

- » Project Initiatives
- » Opportunities and Challenges
- » Partner Efforts

Other News



ANNUAL REPORT TOPICS

Project Goals and Results examples:

- STEP
- Portal
- Business Intelligence
- Waterloo Works

Operational Activities examples:

- RT Statistics
- Network and Access Points
- Application Upgrades



ANNUAL REPORT TOPICS

Risk and Audit examples:

- Residence Pre-Implementation Follow-up
- IT Strategic Plan
- Vulnerability Assessment Follow-up

Other Key Activities examples:

- Org for Success
- IT Strategic Plan
- Privacy & Security Impact Assessment



ANNUAL REPORT TOPICS

New Year Challenges examples:

- Budget
- Changes in senior leadership
- BB2 move



IST ANNUAL PLAN: PROGRAM/PROJECT PRIORITY AND SIZE STATISTICS

Priority	Size (IST Effort in hrs)	Large (>100)	Medium (<100&>30)	Small (<30)	Total
High -Mandatory (Directive/Compliance-Related including Audit, Regulatory, Legislated Change, and Policy)		22	8	2	32
High -Mandatory (Stay-in-Business including Software Compliance for continuing vendor support)		8	2	1	11
High/Medium -Highly Important (Strategically- or Operationally-Driven including Faculty/Departmental/Program Initiatives)		23	16	4	43
Medium -Important (Operationally-Driven including smaller Usability Enhancement Initiatives)		5	9	1	15
Low -Without Urgency (Opportunity-Related including Application Feature Expansion Initiatives)		1	5	2	8
	Total				109



Size (IST Effort) Priority	Large (>100 hrs)	Medium (<100 &> 30 hrs)	Small (<30 hrs)	
High -Mandatory (Directive/Compliance-Related)	<ul style="list-style-type: none"> Solaris to x86 migration MC Retrofit Project Columbia Lake Village (CLV) North residence network Campus Wireless Upgrades Core Network Upgrade to support deployment of border firewall Campus (Border) Firewall Independent Building Routers and Fibre Optic Path Diversity Wireless Rogue Detection, Intrusion Detection/Prevention & Acceptable Use Policy 	<ul style="list-style-type: none"> Cloud Vmware Second Server Room Disaster Recovery Planning Launch of the PMO Web Accessibility Compliance Portfolio Management Program IT Asset Management IT Service Quality Program Safety Tracking Management System HCM Maintenance 2014 Q1 & Q2 Online Expense Claims Campus Incident System (CIS) EBI: Library migration to 10.2 project 	<ul style="list-style-type: none"> Digital Doorman (Food Services) Web Security Reviews PCI DSS Compliance Quest Security Program Projects from Deloitte Security Audits -Secunia/SCCM Integration Projects from Deloitte Security Audits -Security Awareness Launch of Policy & Standards Server Load Balancer Replacement 	<ul style="list-style-type: none"> Developer Security Standards PSIA Re-definition
High -Mandatory (Stay-in-Business)	<ul style="list-style-type: none"> IAMNG Program Housing Move to Nexus R12 eBusiness Suite Upgrade & FORE Upgrade Hospitality Hub-EventWorX (Food Services) 	<ul style="list-style-type: none"> EBI: Cognos 10.2 Acquisition and installation OnBase Upgrade Open Data WCMS ongoing development 	<ul style="list-style-type: none"> Space PIF Project - Archibus Identity Lifecycle Investigation 	<ul style="list-style-type: none"> Parking Services - upgrade AIMS server
High/Medium -Highly Important (Strategically- or Operationally-Driven)	<ul style="list-style-type: none"> HoME Allocator 2014 Digital Video Storage and Delivery Services Service Catalogue WaterlooWorks 	<ul style="list-style-type: none"> Launch of Portfolio & Strategy PPM Tool Acquisition Master Project List Undergraduate Student E-mail in the Cloud 	<ul style="list-style-type: none"> IT Best Practices Netapp Upgrades/Expansion Domain Controller Replacement/Upgrades VMware expansion Database Hardware Refresh 	<ul style="list-style-type: none"> Cell Service Enhancement Incremental Network Expansion and POE switches
Medium -Important (Operationally-Driven)	<ul style="list-style-type: none"> PS Mobile (Quest) InfoEd Upgrade Parking Services EPark upgrade Athletics - Loyalty & Rewards Mobile Application Request Tracker 4 Upgrade 		<ul style="list-style-type: none"> Undergraduate Student Records Central Stores Shipping System Inteum Update Quest De-customizations Program CAS/Shibboleth Investigation Information Security Policies, Standards Lecture Capture and Streaming & Awareness Virtual Desktop Infrastructure (VDI) Digital Video Recorder Replacement 	<ul style="list-style-type: none"> Athletics Projects Security
Low -Without Urgency (Opportunity Related)	<ul style="list-style-type: none"> Automated copyright violation notice handling 		<ul style="list-style-type: none"> Athletics-SRS 2003 As yet undefined projects from LE Retreat Project 172 Cell boosters for MC, TC, RCH, QNC (if needed) Computer Science Network upgrades 	<ul style="list-style-type: none"> Automate Data Transfer Quest to Health Services Health Services - Clinic Information System Upgrade

Size (IST Effort) Priority	Large (>100 hrs)	Medium (<100 &> 30 hrs)	Small (<30 hrs)
High -Mandatory (Directive/Compliance-Related)	<ul style="list-style-type: none"> • Core Network Upgrade to support deployment of border firewall • Second Server Room • IT Asset Management 	<ul style="list-style-type: none"> • PCI DSS Compliance • Quest Security Program • Projects from Deloitte Security Audits -Security Awareness 	<ul style="list-style-type: none"> • PSIA Re-definition
High -Mandatory (Stay-in-Business)	<ul style="list-style-type: none"> • IAMNG Program • R12 eBusiness Suite Upgrade • Open Data 	<ul style="list-style-type: none"> • Identity Lifecycle Investigation 	
High/Medium -Highly Important (Strategically- or Operationally-Driven)	<ul style="list-style-type: none"> • WaterlooWorks • Undergraduate Student E-mail in the Cloud 	<ul style="list-style-type: none"> • VMware expansion 	<ul style="list-style-type: none"> • Cell Service Enhancement
Medium -Important (Operationally-Driven)	<ul style="list-style-type: none"> • Request Tracker 4 Upgrade 	<ul style="list-style-type: none"> • Virtual Desktop Infrastructure (VDI) 	<ul style="list-style-type: none"> • Athletics Projects Security
Low -Without Urgency (Opportunity Related)	<ul style="list-style-type: none"> • Automated copyright violation notice handling 	<ul style="list-style-type: none"> • Computer Science Network upgrades 	<ul style="list-style-type: none"> • Health Services - Clinic Information System Upgrade

INTRODUCING THE PORTFOLIO MANAGEMENT GROUP'S (PMG) VISION STATEMENT

To be leaders in higher education for the identification, planning and execution of IT strategically aligned initiatives.



July 2014



...AND THE PMG'S MISSION STATEMENT

To use and promote industry best practices, adapted to local need, to provide an enterprise-wide approach to identify, prioritize and successfully execute a portfolio of IT work (i.e., services, initiatives, and projects).

The mission is accomplished by achieving the following goals:

- Promotion, standardization and consistency of IST services and processes
- Maximize utilization and leverage IT resources
- Enable the delivery of a unified IT strategy, a sustainable framework for the strategy, and alignment of work with UW and IT strategies
- Offer greater potential for skills growth and specialization amongst IT staff in key areas such as change management, risk management, portfolio/program/project management

