A New Framework for Administrative Applications Governance

Boston University Medical Campus
IT Task Force

September 26, 2008
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Why are we here?

- Describe the origin of ERGO framework
- Describe the ERGO structure and process
- Describe the portfolio development process and tool
Motivation for Change

- Application Services context is increasingly complex.
  - Difficult, unpredictable workload
  - Demands outstripping resources → growing backlog
  - Competing client demands & priorities
  - Project requests often arrive too far along in their development
  - Maintaining long-range integration & coherency an increasing challenge

- What’s missing?
  - Formal institutional process to review, select, prioritize, facilitate, track administrative applications development and support.
  - Corresponding structure, process, resources, and skills within UIS to complement institutional process.

- Huron Consulting was engaged to analyze the situation and make recommendations.
Governance Structure informed by several basic principles

- Requirements should be expressed in business or strategic terms before technical solutions are defined.
- Project costs should be understood prior to review and properly budgeted if approved.
- Project review and prioritization should have a single point of entry.
- Administrative software shouldn’t be developed or introduced without governance approval.
- The vetting process should involve multiple project tiers differentiated by parameters such as scope and scale.
- The process should provide an opportunity to combine functionally related requests originating in different business units.
Recommended Charge

- Create a governance structure encompassing executives, a steering committee, business unit stakeholders, and UIS.

- Establish formal processes governing
  - Project requests
  - Project assessment
  - Project prioritization
  - Resource allocation
  - Project scheduling
  - Project monitoring
ERGO
Enterprise Review & Governance Organization

- Align administrative applications governance with institutional strategic objectives.

- Provide a framework for application planning, alignment, prioritization, funding, and tracking.

- Help materialize leadership commitments and accountability for administrative support of research and education.

- Promote enterprise-wide collaboration, cost control, and service improvement.

- Link delivery to strategy and balances resources to meet institutional priorities.
ERGO Terminology

**Domain**: Area of responsibility led by VP, Dean, or Enterprise Program Director.

**Portfolio**: List of Programs and Projects reflecting Domain objectives and strategies.

**Program**: Initiative proposed or established in response to business objectives.

**Project**: A deployment of resources for delivery of products in a specified time frame.

**Demand Model**: Database used to project and track resource utilization and inform decision makers.
ERGO Framework

ERGO Leadership

ERGO Admin Team

Administrative & Academic Leadership

University Information Systems

Project Realization Process
The ERGO organization integrates constituency groups, operation oversight, process management, and governance functions.
The scope of work under ERGO Governance ranges from proposed strategies to routine support activities.
The Portfolio life cycle:

A portfolio must be validated and updated on an ongoing basis to reflect changing services needs, agreed service targets, resource capacity and commitment, or budgetary and governance decisions.

Define
Identify current and anticipated business programs

Assemble
Merge the project list with the Domain’s program structure.

Refine
Refine project attributes and Portfolio Model

Maintain
Update Portfolio on an ongoing basis to ensure completeness and accuracy.

Align
Ensure that portfolios reflect cross-Domain interdependencies and Enterprise programs

Building Initial Definition

Linking Business Strategy and Delivery

Providing a trackable delivery roadmap

Ensuring a stable source for timely reporting

Optimizing Enterprise-wide performance

Initial Process

On Going Process
Prime - Selection

### Prime - Report Specifications - Microsoft Internet Explorer

**Please choose your selection criteria and click on "Get Population" when you are finished.**

<table>
<thead>
<tr>
<th>Selection Name:</th>
<th>med campus demo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domain:</td>
<td>Administration</td>
</tr>
<tr>
<td>Department Name:</td>
<td>All</td>
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</tbody>
</table>

**Show Additional options:**

**UIS Project Owner:**
- Select--

**UIS Project Manager:**
- Select--

**Project Type:**
- Clear All
- Select All
- Select any combination
- Implementation
- Integration
- New Capability
- Operational Sustainment
- Quickworks
- Support Activity List

**Project Realization Stage:**
- Clear All
- Select All
- Select any combination
- Active Project
- Anticipated
- Approved
- Cancelled
- Completed
- Constrained
- Investigation
- Prioritized
- Rejected
- Requested
- Resourced
- Stopped
- Supercarded

**Project Status:**
- Clear All
- Select All
- Select any combination
- Analysis
- Closure
- Completed
- Construction
- Design
- Installation
<table>
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<th>Project Id</th>
<th>Program Name</th>
<th>Sub Program Name</th>
<th>Project Name</th>
<th>Realization Stage</th>
<th>Project Status</th>
<th>Requested Start Date</th>
<th>Requested End Date</th>
<th>Urgency</th>
<th>Priority</th>
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<td>Data feed for Arena mailing</td>
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</table>
Prime – Project Record – Part I

- VIEW PROJECT -

> Domain Information

- Domain Name: Enrollment & Student Affairs
- Domain Leader Name:
- Portfolio Manager Name:
- Enterprise Program
- Business Relationship Director Name:
- Manager Name:
- Portfolio Name:
- Requestor Group Name: OFA
- Requestor Person Name:
- Department Name: Office of Financial Aid

> Domain Program Information

- Enterprise Program Name: To be determined
- Program Name:
- Sub Program Name: No Program Selected

> Domain Project Information

- Project Name:
- Project Description: Include table FINCOD08 in edits (same routine as BFIV6200)
- Business Project Owner Name:
- Business Project Manager Name:
- Requested Start Date: 
- Requested End Date: 20081001 (yyyyymmdd)
- Project Priority:
- Project Urgency: (1 High to 99999 Low)
- Department Tracking Code:
- Escalate this project?
- Escalation Reasons:

http://www.bu.edu/prime/support/prime ayuda@boston.edu

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Prime – Project Record – Part II

Escalation Reasons

Business Collaborating Groups

1.  
2.  
3.  
4.  
5.  
6.  
7.  
8.  
9.  
10.

Domain Notes and Comments

UIS Project Information

- Project Owner Name: Bene, Ed
- Project Analyst Name: 
- Project Sponsor Name: 

- Project Manager Name: 
- Project Architect Name: 
Prime – Project Record – Part III

**UIS Project Information**

- **Project Owner Name:** Bene, Ed
- **Project Analyst Name:**
- **Project Sponsor Name:**
- **Project Manager Name:**
- **Project Architect Name:**

**Project Attributes**

- **Realization Stage:** Active Project
- **Project Status:** User Testing
- **Planned Start Date:** (yyyy-mm-dd)
- **Planned End Date:** (yyyy-mm-dd)
- **Actual Start Date:** (yyyy-mm-dd)
- **Actual End Date:** (yyyy-mm-dd)
- **Project Type:** Quickworks
- **Project Size:**
- **Project Complexity:**
- **Estimated Man Days:** 0
- **Does this project require a consultant?**
- **Is there a project request document?**
- **File location of Request Document:**

**Project Impact**

Name(s) of System(s) Impacted:
1. 2. 3. 4. 5.
6. 7. 8. 9. 10.

Cross Reference Category Name(s):
1. 2. 3. 4. 5.
6. 7. 8. 9. 10.

**Request Log Information**

UIS Request Log Id(s):
1. 20641021118936 2. 3. 4. 5.

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Administrative Applications Governance Framework

Boston University Medical Campus
How can we work together

- Understand and work toward common goals and business objectives
- Share artifacts, tools and process/policy proposals developed at BUMC or CRC
- Support BUMC portfolio development process
- Identify and develop a cross-campus charter for active or emerging projects where collaboration would be desirable
- Continue ongoing communications and collaboration with the UIS project office.
Questions?  Comments?  Suggestions?
Managed delivery requires an organization that aligns Domain and UIS resources and objectives.

Portfolio management helps ensure alignment and performance.