Managing EA Work and Communicating Up at UW

Jim Phelps
Director of EA, University of Washington
From the Longest View to the Shortest View and History

- **EA Team Backlog** (Mural Document)
  - 6 Months to 1 Year look ahead

- **Quarterly Plan** (Google Sheet)
  - 3 Month look ahead (6 Sprints)

- **2 Week Sprints** (JIRA)
  - 2 Week Work Plan

- **Reporting** (Custom App)
  - 3 Month look back (6 Sprints)
EA Backlog - Longest View Looking Forward

EA Backlog

EA mapping of Impact of efforts vs. Organizational Readiness

Collect your ideas in one place

Idea Bank

EA Backlog 2020-10-13

Impact

High

Low

Organizational Readiness

High

Low

Lean/CI program

Strategy Management Practice

UWFT Solution Architecture

Reference architecture assurance

APIS 2.0 - IT Standards

Overview of Development

SDS Impact Analysis

Important end of life planning

Security architecture review

UW/IT BPM Strategy

IT Bus. Mgmt. Improvements

SMI Improvements

EA support for data governance

Principles 2.0 Development

Identity registry process mapping

Leading change at UW

Student/IM/IT API Alignment

Container + Cloud Testing

Change lifecycle

Advancement CRM

UW/IT operating model analysis

Info. Access Agreement Service

Start Adaptive Leadership COP

Start Lean COP

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Enterprise Architecture & Strategy
Opportunity Matrix

Map potential engagements (investments) based on:

**Impact**
- Higher impact opportunities:
  - Promote a strategic goal
  - Address a big risk
  - Reach a broad audience
  - Make a big long-term difference

**Organizational Readiness**
- Readier opportunities:
  - Have sponsorship
  - People feel engaged or urgent about
  - Match organizational maturity
  - Build on past success
  - Build on available skills

- Potential engagement
Opportunity Matrix

Map potential engagements (investments) based on:

Impact
Higher impact opportunities:
- Promote a strategic goal
- Address a big risk
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Organizational Readiness
Readier opportunities:
- Have sponsorship
- People feel engaged or urgent about
- Match organizational maturity
- Build on past success
- Build on available skills

There is no scoring system or rubric for these two dimensions.
We “score” it based on our gut feeling and experience.

This means it is lightweight and easy to do.

- People feel engaged or urgent about

It also means it is a great way to start a discussion with the CxOs, EA Board and others.

We get to ask, “Do you think we have this in the right spot?”
Sorting Opportunities

Using the matrix, sort proposed engagements into, for example:

- **High Impact, High Organizational Readiness:** Invest here
- **Low Impact, Low Organizational Readiness:** Try to increase impact & readiness
- **High Impact, Low Organizational Readiness:** Try to increase impact
- **Low Impact, High Organizational Readiness:** Try to increase readiness

Potential:
- **High potential**
- **Moderate potential**
- **Low potential**

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**Enterprise Architecture & Strategy**
The EA Backlog lets us:

> Scan the enterprise for possible engagements
> Do a quick assessment of the impact and readiness for each
> Share our view of the enterprise with the EA Board and others
  — What we are doing
  — What we aren’t doing
  — What the enterprise isn’t ready to do yet
  — Etc.
> Link Low Impact efforts to bigger impact goals
> Get our leadership to think about the impact and readiness of various efforts
> Get other groups to volunteer to pick up gaps
> Get other groups to see their work in context and to assess their own work in terms of impact and readiness

Link to Mural Backlog Document
# EA Quarterly Plan - A Quarter = 6 Sprints, 12 Weeks.

**Health Check**

<table>
<thead>
<tr>
<th>Report Group</th>
<th>Workstream</th>
<th>Epic ID</th>
<th>Epic Name</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

**Workstream: UW-IT Strategy Development**

<table>
<thead>
<tr>
<th>Sponsor/Requester Count</th>
<th>EA Quarterly Plan</th>
<th>Workstream</th>
<th>Epic ID</th>
<th>Epic Name</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jim (10), Aaron (6), Erik H. (1), Erik L. (2), EAB (1), Bred (3), Anja (3), Christy (0), Mary M (0), Paul S (0), Bill F (0), Heidi (0)</td>
<td>Sponsor</td>
<td>EA Priority</td>
<td>High</td>
<td>Must</td>
<td>Should</td>
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<tr>
<td>Jim (10)</td>
<td>106%</td>
<td>104%</td>
<td>112%</td>
<td>106%</td>
<td>XS (10) Small (5), Small (4), Large (2), XL (3)</td>
</tr>
</tbody>
</table>

**WIA**

| TBD | Research Computing Strategy Q2 | Research | Erik L. | Must | No | phelpaj | 10 | 10 |
| EAA-6183 | API Managementvision & roadmap development | Plan Work | Roadmap | API protos | Brad | Should | Yes | phelpaj | 4 | 4 | 8 | 1.2% XS |
| TBD | MCP Strategy & Roadmap Q2 | Work | Alan | Lechtenberg | Publish | Camp MCI strategic policy | Yes | phelpaj | 4 | 4 | 2 |
| TBD | Refresh Strategy Practice Q2 | Identify current scope of strategy practice | Update | Strategy Into Action and other pages | No (4) | Could | No | phelpaj | 5 | 5 | 5 | 15 |

**UW-IT Leadership Support**

| EAA-6184 | CTO Support Q2 | Monthly meetings | Brad | Should | Yes | rbork | 6 | 6 | 0.9% XS |
| EAA-6185 | CIO Analytical Support Q2 | Support the CIO as requested | Aaron | Should | Yes | phelpaj | 6 | 6 | 0.9% |
| EAA-6186 | Future of Work Q2 | Provide analysis and content | Jacob | Should | Yes | phelpaj | 24 | 8 | 4 | 36 | 5.3% |

**UW Governance and Reference Architecture**

| EAA-6187 | IT Standards at UW Q2 | Draft example standards and share with various groups | Aaron | Must | Yes | phelpaj | 10 | 10 | 10 | 30 | 4.4% M |
| EAA-6188 | Workday Guardrails Q2 | Facilitate development of Service Management Guardrails; Facilitate updates to existing GRRs | EAB | Must | Yes | phelpaj | 5 | 8 | 13 | 1.9% XS |
| TBD | Document As-is Data and Application Architecture | Expand | EA architecture to include overviews of SEI's architecture and common patterns | INP | Could | No | phelpaj | 5 | 15 | 15 | 30 |

**UW Student Experience**

| TBD | Future of SIS Q2 | Build a shared vision of the future of SIS | Erik | Hoffa | Should | No | phelpaj | 5 | 5 |

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**Demo**

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**Enterprise Architecture & Strategy**
Quarterly Plan - Medium 12 week view / resource plan

The Quarterly Plan lets us:

> Balance our effort across the many requests for help
> Show why we aren’t doing everything that is asked of us
> Make a cut at what is a MUST vs. SHOULD vs. COULD and discuss that cut with our EA Board and stakeholders
> Make sure we aren’t over committed
> Make sure we don’t have too much WIP (Work In Progress)

It also drives our JIRA set up and our Reporting of Plan to Actuals but we will get to that.

https://docs.google.com/spreadsheets/d/169RVaaKbNxszrAEQQgYxlqP6WjnEeZenHQRJB86ibql/edit#gid=613401064
JIRA - 2 Week Sprints. 6 Sprints per Quarter. 4 Weeks of slack

<table>
<thead>
<tr>
<th>EPICS</th>
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</thead>
<tbody>
<tr>
<td>API Management vision &amp; roadmap Q2</td>
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<tr>
<td>CTO Support Q2</td>
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</tr>
<tr>
<td>CIO Analytical Support Q2</td>
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<tr>
<td>Future of Work Q2</td>
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<tr>
<td>IT Standards at UW Q2</td>
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<tr>
<td>Workday Guardrails Q2</td>
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<tr>
<td>Lead the BACoP Q2</td>
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<tr>
<td>Lead the Embedded Architects CoP Q2</td>
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<tr>
<td>Cloud reference architecture Q2</td>
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<tr>
<td>GCP Cloud Architect Training Q2</td>
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<td>UWM/UWIT 0385</td>
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**EA 2021 Q2 Sprint 1**
- 17 of 61 issues

<table>
<thead>
<tr>
<th>Issue</th>
<th>Title</th>
<th>Assigned to</th>
</tr>
</thead>
<tbody>
<tr>
<td>EAA-6166</td>
<td>Participate in IDAWG</td>
<td>UW Data Governance...</td>
</tr>
<tr>
<td>EAA-6167</td>
<td>Participate in Data Governance</td>
<td>UW Data Governance...</td>
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<tr>
<td>EAA-6158</td>
<td>Mural Accessibility Analysis</td>
<td>Future of Work Q2</td>
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<tr>
<td>EAA-6176</td>
<td>Prep for and run Itana Steering</td>
<td>Itana, EDUCAUSE a...</td>
</tr>
<tr>
<td>EAA-6176</td>
<td>Schedule UWFT Value Working Session (2 hours)</td>
<td>UW-IT UWFT Value...</td>
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<tr>
<td>EAA-6189</td>
<td>Prep for UWFT Value Working Session</td>
<td>UW-IT UWFT Value...</td>
</tr>
<tr>
<td>EAA-6181</td>
<td>Update Education and Outreach Roadmap</td>
<td>Future of Work Q2</td>
</tr>
<tr>
<td>EAA-6220</td>
<td>Prep for CSG Planning Session</td>
<td>Itana, EDUCAUSE a...</td>
</tr>
<tr>
<td>EAA-6221</td>
<td>Set up Poll in Zoom for Itana Session and Set up breakout rooms</td>
<td>Itana, EDUCAUSE a...</td>
</tr>
<tr>
<td>EAA-6222</td>
<td>Watch Roland's video</td>
<td>Procurement Maturi...</td>
</tr>
<tr>
<td>EAA-6227</td>
<td>Research Privacy Office Initiatives - discuss with Jacob</td>
<td>Unplanned Work Q2</td>
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<tr>
<td>EAA-6228</td>
<td>Create Mentoring Circle Profile and Join Itana Circle</td>
<td>Itana, EDUCAUSE a...</td>
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**EA 2021 Q2 Sprint 2**
- 16 of 29 issues

<table>
<thead>
<tr>
<th>Issue</th>
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<tbody>
<tr>
<td>EAA-6226</td>
<td>Write up - Managing the work of an EA Team based on our artifacts and JIRA</td>
<td>EA Practice 2.0 Q2</td>
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<tr>
<td>EAA-6030</td>
<td>Participate in UW / UBC discussion</td>
<td>UWFT &amp; IT Architecture...</td>
</tr>
</tbody>
</table>
JIRA - Short 2 week (1 Sprint) to 4 week resource plan

JIRA lets us:

> Plan the next two weeks of work for individuals
> Figure out what our velocity is (in terms of points per sprint per person = 50 points)
> Capture time spent vs. estimates (0)
> Drives Reporting of Plan to Actuals
JIRA - 2 Week Sprints. 6 Sprints per Quarter. 4 Weeks of slack

- Participate in GCP architecture training (EAA-5864)
- Support the Graduate School in requirements gathering for new Grad App (EAA-5869)

| UW Data Management | Work on FDR analysis, Roadmap, Solution Architecture, etc. (EAA-5874)  
|                    | Lead a data pipeline POC project in parallel to FDR work that investigates streaming technology. (EAA-5875)  
|                    | Enable new UW Data Governance including Domain Councils and FRAG. Support Anja, Doug Divine, and others. (EAA-5876) |

| UW-IT             | Plan work for vision and roadmap development (including API pilots) Work with Brad, Anja, Erik H on roadmap. (EAA-5853)  
|                   | Work with Alan Lechtenberg on developing and publishing the MCI strategic roadmap. (EAA-5854)  
|                   | Monthly meetings with the CTO to identify and support his initiatives (EAA-5855)  
|                   | Support the CIO as requested (EAA-5856)  
|                   | Work with Jacob and SLT on the Future of Work / Return to Work planning (EAA-6016)  
|                   | UWM/UWIT O365 Partnership Q1 -2021 (EAA-5844)  
|                   | Assist IM in aligning Advancement CRM to broader goals (EAA-5865)  
|                   | Work on maturing the Procurement Office process / lead change management for new practices (EAA-5841) |
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Reporting (Custom App)
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