

INFORMATION TECHNOLOGY

UNIVERSITY *of* WASHINGTON

Enterprise Architecture & Strategy

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)



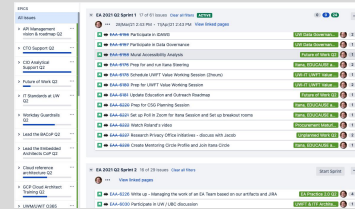
6 Months to
1 Year look ahead

Quarterly Plan (Google Sheet)

A Google Sheet spreadsheet showing a quarterly plan. The table has multiple columns, including task names, status indicators (like 'On Track', 'At Risk'), and dates. The data is organized into rows, likely representing different tasks or milestones over time.

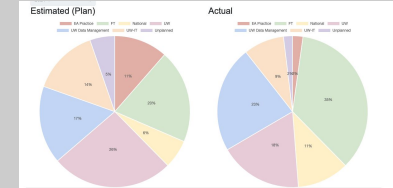
3 Month look
ahead (6 Sprints)

2 Week Sprints (JIRA)



2 Week Work Plan

Reporting (Custom App)



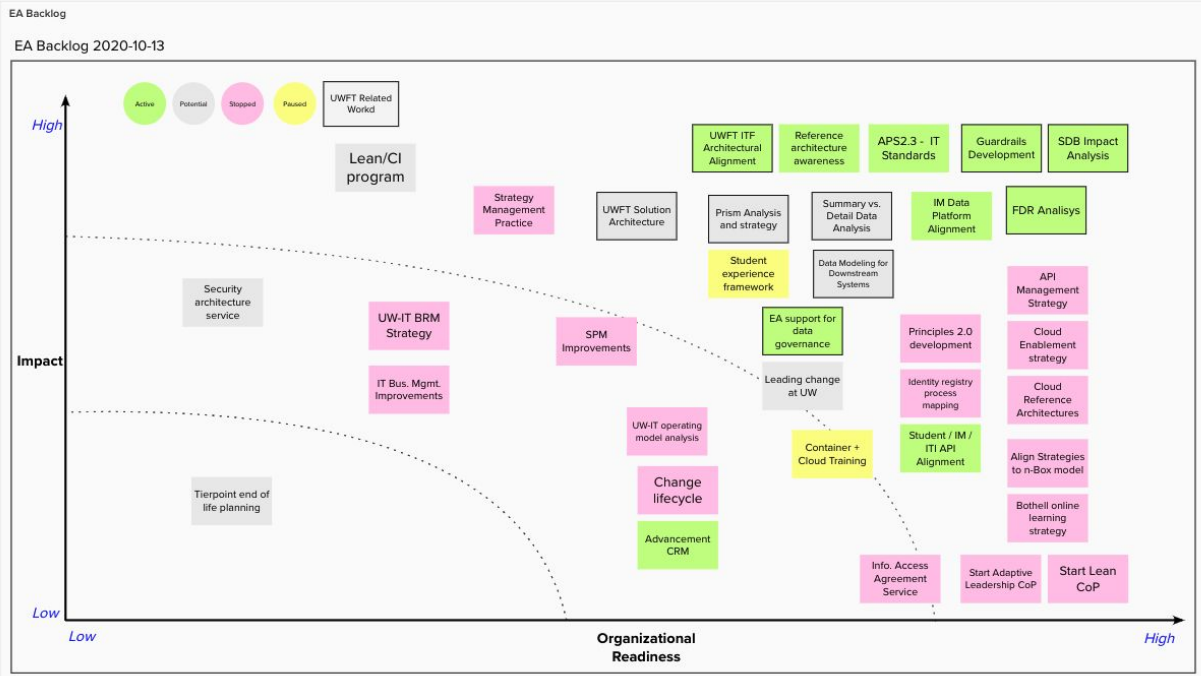
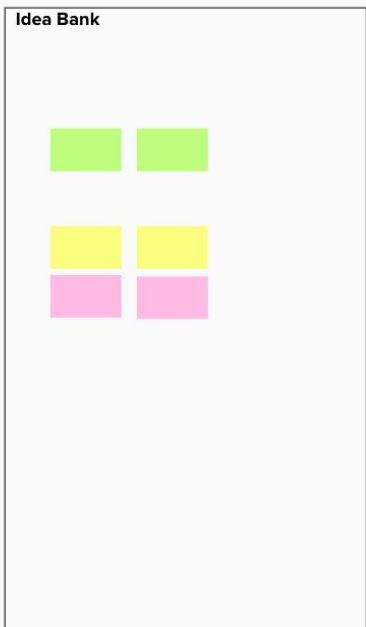
3 Month look back
(6 Sprints)

EA Backlog - Longest View Looking Forward

EA Backlog

EA mapping of Impact of efforts vs. Organizational Readiness

1 Collect your ideas in one place



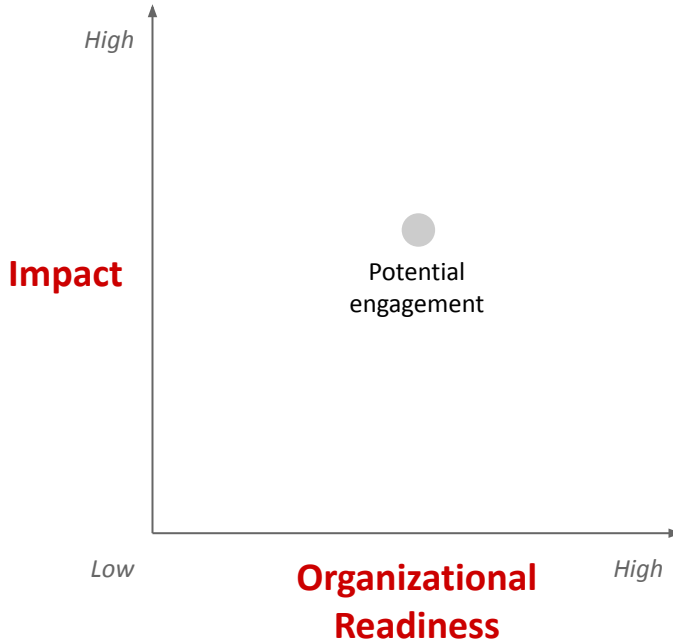
Opportunity Matrix

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

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

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.

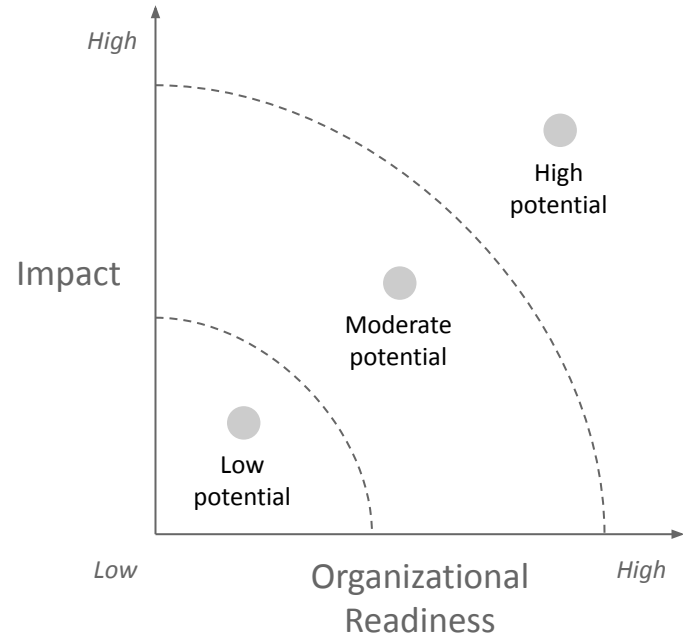
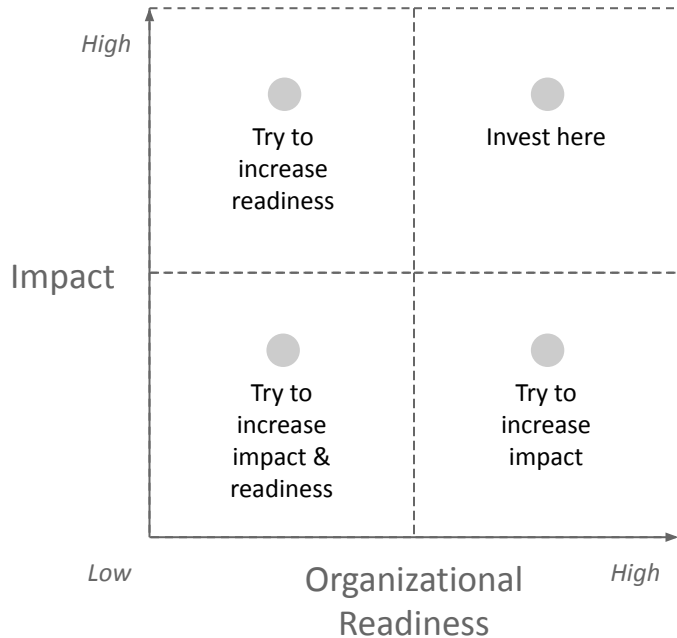
- People feel engaged or

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:

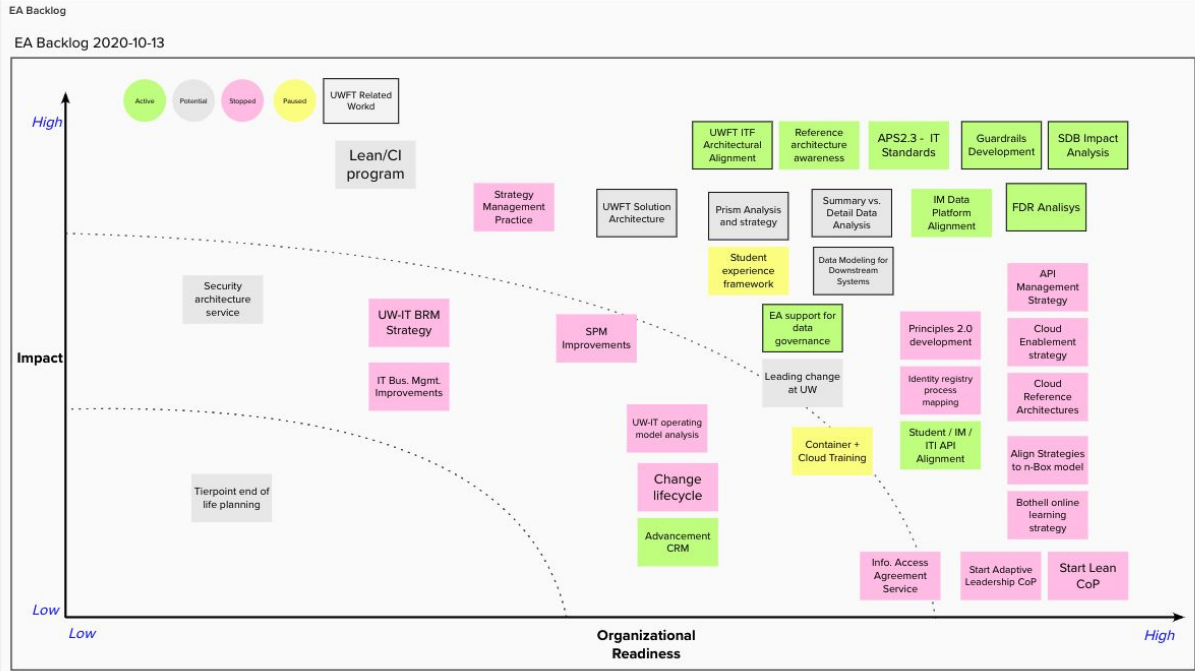
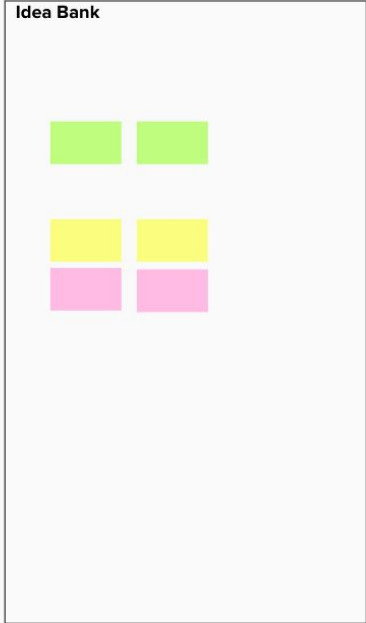


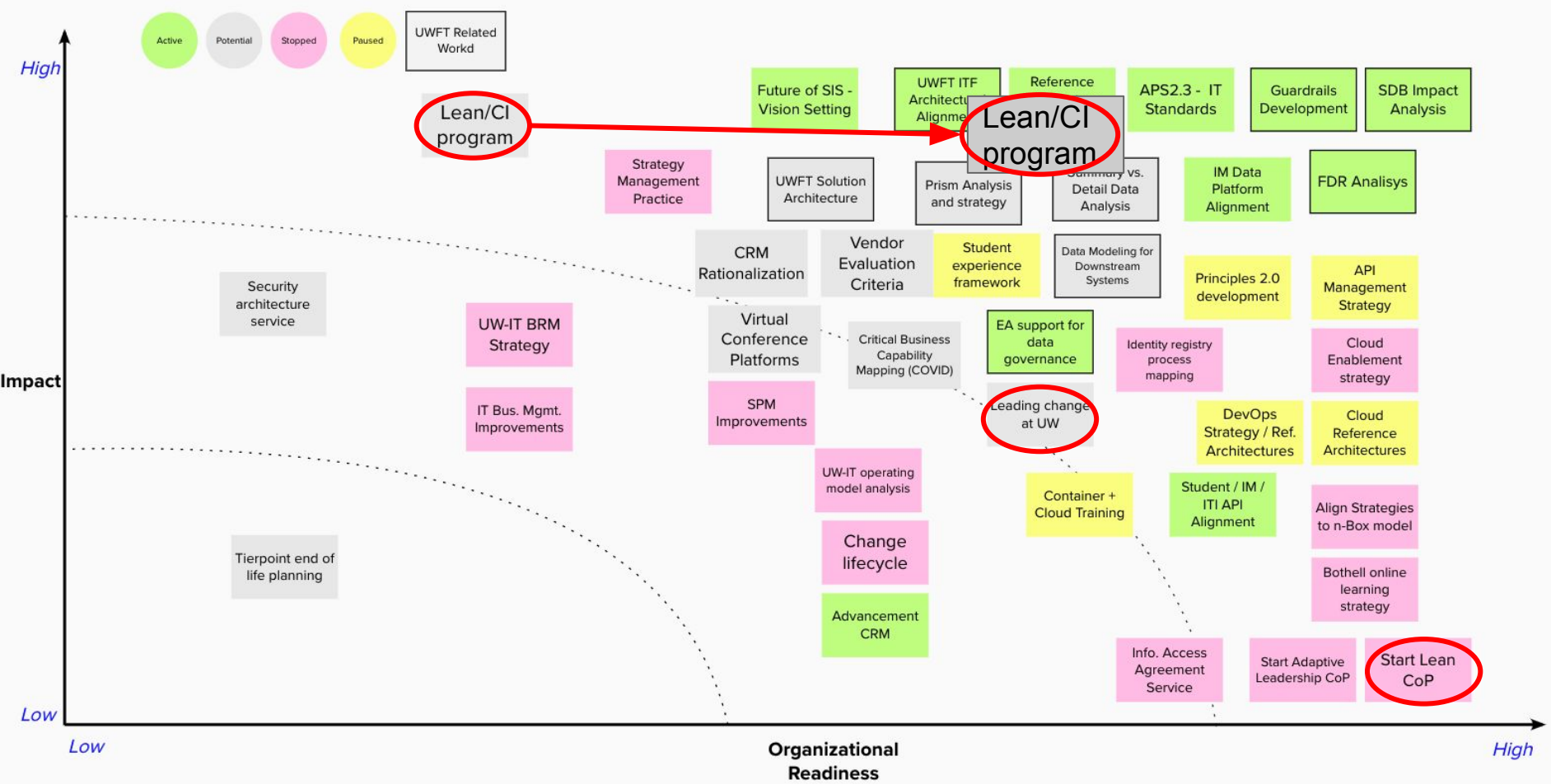
EA Backlog - Longest View Looking Forward

EA Backlog

EA mapping of Impact of efforts vs. Organizational Readiness

1 Collect your ideas in one place





EA Backlog - Longest View

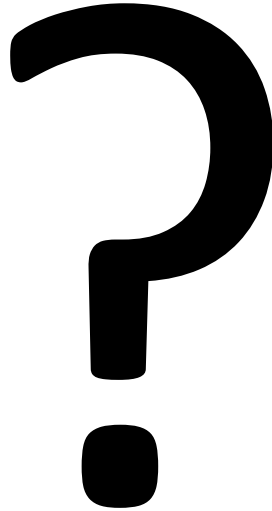
The EA Backlog lets us:

- > 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 Backlog - Longest View



EA Quarterly Plan - A Quarter = 6 Sprints, 12 Weeks.

Health Check	Report Group	Workstream	Epic ID	Epic Name	Summary	Sponsor	EA Priority	High WIP	Must, Should, Could, TBD	Include in Estimate	Lead	Jim	Piet	Rupert	Est Points	% Total	T-Shirt Size
RGY												106%	104%	112%	106%		
					Sponsor / Requester Count: Jim (10), Aaron (5), Erik H. (1), Erik L. (2), EAB (1), Brad (3), Anja (3), Christy (0), Mary M. (0), Paul S. (0), Bill F. (0), Heidi (0)		EA Priority (2)	High WIP (3)	Must (13), Should (16), Could (7), TBD (0)	Include in Estimate: Yes (28), No (8)	Jim (0), Piet (0), Rupert (0), Jacob (0), TBD (0)						XS (10), Small (6), Med (4), Large (2), XL (2)
1.2%	UW-IT	UW-IT Strategy Development			#N/A												
			TBD	Research Computing Strategy Q2	Refine the Research Computing Strategy	Erik L.			Must	No	phelps	10			10		
		EAA-6183		API Management vision & roadmap Q2	Plan work for vision and roadmap development (including API pilots) Work with Brad, Anja, Erik H on roadmap.	Jim			Should	Yes	phelps	4		4	8	1.2%	XS
			TBD	MCP Strategy & Roadmap Q2	Work with Alan Lechtenberg on developing and publishing the MCI strategic roadmap.	Brad			Could	No	rberk			4	2		
			TBD	Refresh Strategy Practice Q2	Identify current scope of strategy practice (e.g., working with Karlee re SMB) and do minimum outreach to support it; update Strategy Into Action and other pages.	Aaron			Could	No	phelps	5	5	5	15		
					To create a new EPIC line, select this line and right-click												
					to Insert 1 row above. THEN copy cells B-C, M-R, and V-Y from the row above. Delete cell D in this row when you have completed planning												
7.1%	UW-IT	Leadership Support			#N/A												
		EAA-6184		CTO Support Q2	Monthly meetings with the CTO to identify and support his initiatives	Brad			Should	Yes	rberk			6	6	0.9%	XS
		EAA-6185		CIO Analytical Support Q2	Support the CIO as requested	Aaron			Should	Yes	phelps	6			6	0.9%	
		EAA-6186		Future of Work Q2	Provide analysis and content for the Future of Work effort	Jacob			Should	Yes	phelps	24	8	4	36	5.3%	
					To create a new EPIC line, select this line and right-click												
					to Insert 1 row above. THEN copy cells B-C, M-R, and V-Y from the row above. Delete cell D in this row when you have completed planning												
6.4%	UW	Governance and Reference Architecture			No currently planned effort												
		EAA-6187		IT Standards at UW Q2	Draft example standards and share with various groups. Draft language for APS 2.3	Aaron			Must	Yes	phelps	10	10	10	30	4.4%	M
		EAA-6188		Workday Guardrails Q2	Facilitate development of Service Management Guardrails; Facilitate updates to existing GRs.	EAB			Must	Yes	phelps	5	8		13	1.9%	XS
			TBD	Document As-Is Data and Application Architecture	Expand the EA site/library to include overviews of as-is architecture and common patterns, in support of further standards/guardrails work.	Jim P			Could	No	pietn	5	15	15	35		
					To create a new EPIC line, select this line and right-click												
					to Insert 1 row above. THEN copy cells B-C, M-R, and V-Y from the row above. Delete cell D in this row when you have completed planning												
0.0%	UW	Student Experience			No currently planned effort												
			TBD	Future of SIS Q2	Build a shared vision for the future of SIS across campus	Erik Hoffer	Yes		Should	No	phelps	5			5		
					Continue to support the RO in strategy development	Helan											



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)

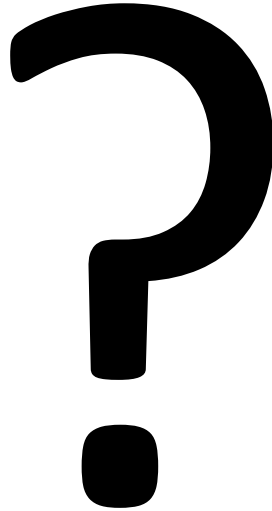
It also drives our JIRA set up and our Reporting of Plan to Actuals but we will get to that.

<https://docs.google.com/spreadsheets/d/169RVaaKbNxszrAEQQgYxIqP6WinEeZenHORJB86lbaI/edit#gid=613401064>

Health	Client Group	Work Item	Epim ID	Epim Name	Summary	Sponsor	EA Priority	Mod. Should	Include in Estimate	Lead	Am	Pln	Reser	Act	% Total	3-Set Size
					Sponsor / Responder Count Am (1), Pln (1), Reser (1), Act (1), Total (4) EA Board (1), Am (1), Pln (1), Reser (1), Act (1), Total (4)							100%	100%	111%	100%	
					1.2% UW/IT UWF Strategy Development											
					Review the Research Computing Strategy	EA L										
					EA41163 API Management vision & roadmap Q2	Am	Should	Yes	pln/pln		4	4	8	1.2%	X5	
					MSF Strategy & Roadmap Q2	EA L										
					Refresh Strategy Roadmap Q2	EA L										
					Refresh Strategy Roadmap Q2	EA L										
					7.1% UW/IT Leadership Support											
					EA41164 CTO Support Q2	EA L	Should	Yes	pln		6	6	0.9%	X5		
					EA41165 CIO Analytics Support Q2	EA L	Should	Yes	pln/pln		6	6	0.9%			
					EA41166 Future of Work Q2	EA L	Should	Yes	pln/pln		24	4	36	9.3%		
					6.4% UW Governance and Reference Architecture											
					EA41167 IT Standards at UW Q2	EA L	Must	Yes	pln/pln		10	10	30	4.4%	M	
					EA41168 Workday Governance Q2	EA L	Must	Yes	pln/pln		5	8	13	9.5%	X5	
					EA41169 Document Arch Data and Application Governance	EA L	Should	Yes	pln		10	10	30			
					0.5% UW Student Experience											
					EA41170 Future of SIS Q2	EA L	Should	Yes	pln/pln		6	6	9			



EA Quarterly Plan - 12 Week View



JIRA - 2 Week Sprints. 6 Sprints per Quarter. 4 Weeks of slack

EPICS	
All issues	
> API Management vision & roadmap Q2	...
> CTO Support Q2	...
> CIO Analytical Support Q2	...
> Future of Work Q2	...
> IT Standards at UW Q2	...
> Workday Guardrails Q2	...
> Lead the BACoP Q2	...
> Lead the Embedded Architects CoP Q2	...
> Cloud reference architecture Q2	...
> GCP Cloud Architect Training Q2	...
> UWM/UWIT O365	...

EA 2021 Q2 Sprint 1 17 of 61 issues [Clear all filters](#) **ACTIVE** 0 0 24 ...

28/Mar/21 2:43 PM • 11/Apr/21 2:43 PM [View linked pages](#)

↔ EAA-6156 Participate in iDAWG	UW Data Governan...	2
↔ EAA-6157 Participate in Data Governance	UW Data Governan...	1
↔ EAA-6158 Mural Accessibility Analysis	Future of Work Q2	1
↔ EAA-6176 Prep for and run Itana Steering	Itana, EDUCAUSE a...	2
↔ EAA-6178 Schedule UWFT Value Working Session (2hours)	UW-IT UWFT Value ...	1
↔ EAA-6180 Prep for UWFT Value Working Session	UW-IT UWFT Value ...	2
↔ EAA-6181 Update Education and Outreach Roadmap	Future of Work Q2	1
↔ EAA-6220 Prep for CSG Planning Session	Itana, EDUCAUSE a...	1
↔ EAA-6221 Set up Poll in Zoom for Itana Session and Set up breakout rooms	Itana, EDUCAUSE a...	1
↔ EAA-6222 Watch Roland's video	Procurement Maturi...	1
↔ EAA-6227 Research Privacy Office initiatives - discuss with Jacob	Unplanned Work Q2	2
↔ EAA-6228 Create Mentoring Circle Profile and Join Itana Circle	Itana, EDUCAUSE a...	1

EA 2021 Q2 Sprint 2 16 of 29 issues [Clear all filters](#) Start Sprint ...

[View linked pages](#)

↔ EAA-6226 Write up - Managing the work of an EA Team based on our artifacts and JIRA	EA Practice 2.0 Q2	4
↔ EAA-6030 Participate in UW / UBC discussion	UWFT & ITF Archite...	1

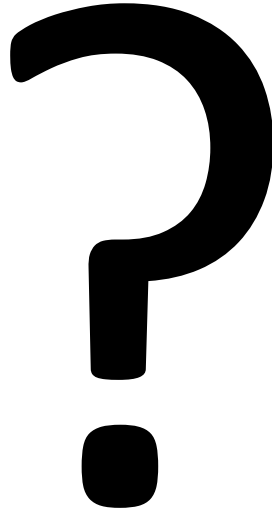
JIRA - Short 2 week (1 Sprint) to 4 week resource plan

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 (O)
- > Drives Reporting of Plan to Actuals

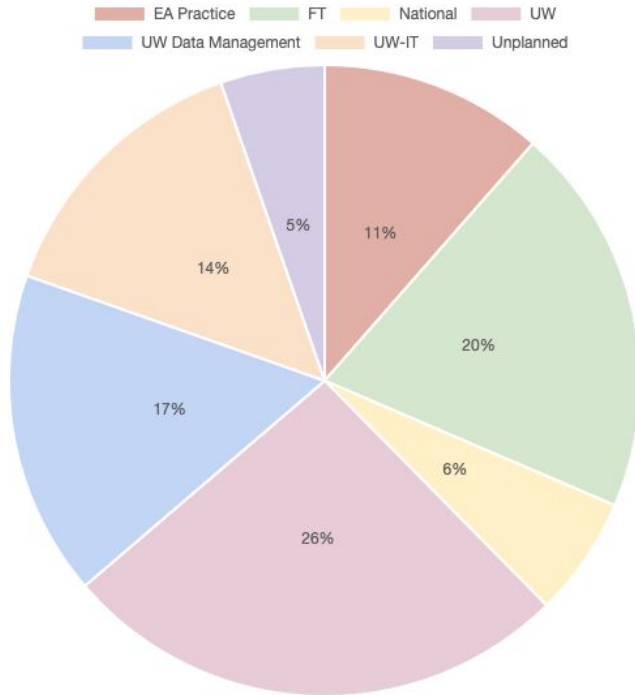
The image shows a JIRA issue form with several fields. Two fields are circled in red: 'Time Spent' and 'Story Points'. The 'Time Spent' field contains the value '4h' and has a help icon. The 'Story Points' field contains the value '4' and has a help icon. Other visible fields include 'Resolution' (Complete), 'Fix Version/s', 'Assignee' (Jim Phelps), 'Description', 'Issue Type' (Story), 'Date Started' (Apr/21 2:13 PM), 'Remaining Estimate' (Adjust automatically), and 'Non-Technical Summary (required)'. The 'Story Points' field is also labeled as 'Story Points' and has a help icon.

EA JIRA - 2 Week View

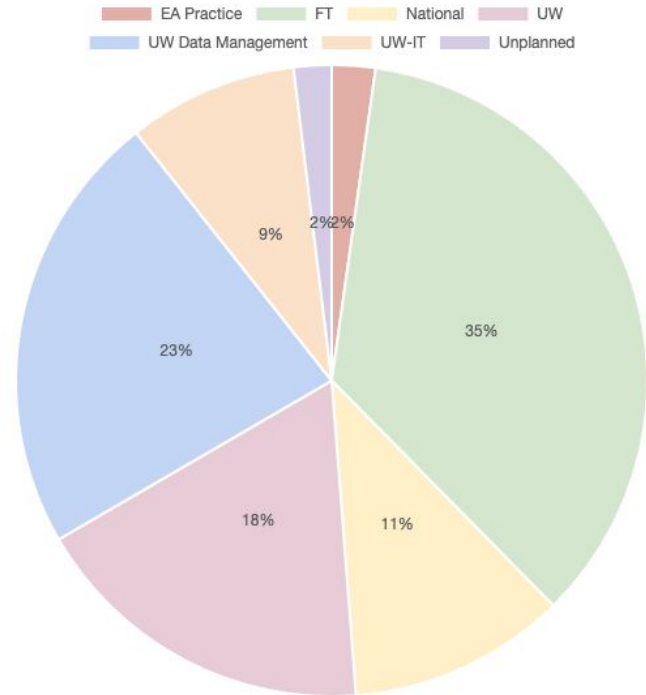


Reporting Tool - build by Rupert Berk

Estimated (Plan)



Actual



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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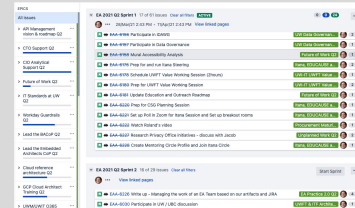
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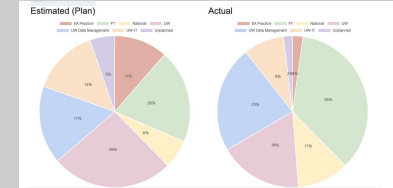
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Open Discussion

