

IT Perspective:

Connections with Impact

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Director IT PMO


THINK



**Lutheran
Social Service**
of Minnesota

The **Agenda**

Making Friends with your technology team

Translating “IT-Speak” for the business brain



Expanding Our Network for greatest impact



Making **Friends**

Who is your technology counterpart?

Do you participate in Technology Project Prioritization?

Does your IT team know what *your* goals are?



> IT Project Summary

IT Project Summary - as of 7/30/2020



COMPLETED SINCE: 4/1/2020

Project #	Project Title	Application	Caller/Department	Completed	PM	Technical	Size	Priority
1	PR0001121 Microsoft - Deploy Microsoft Office 365 desktop suite	Office 365	Mike Bohlsen-Information Technology	7/21/2020	Jim Basa	Jim Basa	Large	High
2	PR0001482 CRM Upgrade to Version 9.0	Crn	Mark Shryock-Information Technology	7/17/2020	Daniel Holmgren	Mark Shryock	Large	Moderate
3	PR0001658 LSS Meals Client Information Database and Centralized Billing	-Other-	Rocanne Jenkins -Admin AVP Older Adults	7/27/2020	Kenneth Holloman	Paul Dirlewager	Medium	High
4	PR0001715 Evaluate Alphabet Doc. Signing for Financial Services	-Other-	Bekdy Pakantien Financial Services	4/28/2020	Kenneth Holloman	Joan Khoo	Medium	Moderate
5	PR0001749 Zoom Corporate Account	-Other-	Mike Bohlsen-Information Technology	5/18/2020	Heidi Leach	Mike Bohlsen	Medium	Moderate
6	PR0001531 Migrate UP Application to SharePoint Online 0.365	Sharepoint	Sharon Bauer-Information Technology	6/22/2020	Sharon Bauer	Sharon Bauer	Large	Moderate
7	PR0001692 PHASE II - Licensing and Accreditation	Sharepoint	Amy Rademacher- Compliance & Integration	6/29/2020	Sharon Bauer	Sharon Bauer	Medium	Moderate
8	PR0001743 New Evolv programs for Central MN	Evolv	Gal Miller-Housing Services	6/30/2020	Cory Weirich	Cory Weirich	Medium	Moderate
9	PR0001628 #1 - Evolv - New DOCCR program	Evolv	Heather Kamis Behavioral Health	7/15/2020	Sherrill Herron	Sherrill Herron	Large	Moderate

IN PROGRESS

Project #	Project Title	Application	State	Target Complete	Percent Complete	Objectives	Caller/Department	PM	Technical	Size	Priority
1	PR0001754 Lifetrack IT to LSS	-Other-	Planning/Design	10/30/2020	15	Strategic Goal, Increased Security.	Mike Bohlsen-Information	Heidi Leach	Mike Bohlsen	Large	High
2	PR0001696 Kronos Workforce Advanced Scheduler	Kronos	Planning/Design	9/30/2020	20	Financial Benefit, Process	Mark Dubbels Admin AVP	Heidi Leach	Joan Khoo	Large	High
3	PR0001756 IT Policy Manual Refresh	-Other-	Planning/Design	8/31/2020	20	Maintenance	Mike Bohlsen-Information	Heidi Leach		Medium	Moderate
4	PR0001649 PICS Portal Time Card Yearly Acknowledgment	PICS Portal	Testing/QA	8/31/2020	95	Compliance,	Tory Mehta-Partners in	Paul Dirlewager	Paul Dirlewager	Medium	Critical
5	PR0001723 PICS Portal - Add Employee Approval of Time Cards	PICS Portal	Testing/QA	8/31/2020	90	Compliance,	Tory Mehta-Partners in	Paul Dirlewager	Paul Dirlewager	Large	High
6	PR0001695 PICS Spending Summary Report	CRM	Testing/QA	8/14/2020	95	Enhanced User Experience,	Stacey Abbouch-Partners in	Heidi Leach	Mark Shryock	Medium	Moderate
7	PR0001698 Implement New Payroll Batch Process	CRM	Planning/Design	8/31/2020	75	Process Improvements,	Tory Mehta-Partners in	Mark Shryock	Mark Shryock	Medium	Moderate
8	PR0001719 Guardianship Pooled Trust CRM	CRM	Planning/Design	8/18/2020	60	Process Improvements, Enhanced	Kim Watson-Guardianship	Daniel Holmgren	Mark Shryock	Medium	Moderate
9	PR0001691 Property CRM - Insurance Records	CRM	Planning/Design	8/31/2020	10	Process Improvements	Ann Terlizi-LSS Risk	Daniel Holmgren	Mark Shryock	Medium	Moderate
10	PR0001738 Caregiver and Companion Survey Process	CRM	Planning/Design	9/30/2020	20	Enhanced User Experience	Nicole Bauer-LSS Companion	Daniel Holmgren	Mark Shryock	Medium	Moderate
11	PR0001378 Caregiver Respite in Sr Corps CRM	CRM	Planning/Design	9/30/2020	50	Process Improvements,	Nicole Bauer-LSS Companion	Daniel Holmgren	Mark Shryock	Large	Moderate
12	PR0001688 Senior Companion Referral Portal Enhancements	Custom Apps	Planning/Design	8/14/2020	60	Process Improvements, Compliance,	Nicole Bauer-LSS Companion	Daniel Holmgren	Paul Dirlewager	Medium	Moderate
13	PR0001748 Replace DocuSign w/ AlphaTrust	-Other-	Planning/Design	9/30/2020	50	Financial Benefit,	Mike Bohlsen-Information	Kenneth Holloman	Steve Pearson	Medium	Moderate
14	PR0001375 CareManager Integration with Evolv	Evolv	Testing/QA	9/1/2020	50	Process Improvements,	Tory Mehta-Partners in	Kenneth Holloman	Sherrill Herron	Medium	Moderate
15	PR0001729 myEvolv (NIX) Planning	Evolv	Planning/Design	9/30/2020	25	Strategic Goal, Enhanced User	Paul Dirlewager-Information	Kenneth Holloman	Cory Weirich	Large	Moderate
16	PR0001725 Re-Do Evolv Workflows for Behavioral Health	Evolv	Planning/Design	9/30/2020	10	Process Improvements, Compliance,	Tevor Johnson-Metres Youth	Cory Weirich	Cory Weirich	Medium	Moderate
17	PR0001532 Migrate or Research AP Move to SharePoint Online 0365	Sharepoint	Testing/QA	8/31/2020	80	Process Improvements, Increased	Mike Bohlsen-Information	Sharon Bauer	Sharon Bauer	Large	High
18	PR0001607 Host Homes External Site	Sharepoint	Planning/Design	8/31/2020	40	Process Improvements, Increased	Mike Bohlsen-Information	Daniel Holmgren	Paul Dirlewager	Medium	Moderate
19	PR0001382 Great Plains Upgrade	Great Plains	Testing/QA	10/31/2020	20	Compliance,	Kyle Larsen-Information	Kenneth Holloman	Brian Heigle	Large	High
20	PR0001642 Microsoft - Secure On Premise Applications with AzureAD	-Other-	Implementation	9/1/2020	75	Increased Security,	Mike Bohlsen-Information	Mike Bohlsen	Jeff Rogers	Medium	Moderate
21	PR0001119 Microsoft - Windows 10 Upgrades	-Other-	Implementation	9/1/2020	70	Compliance, Increased Security,	Mike Bohlsen-Information	Jim Basa	Jim Basa	Large	Moderate
22	PR0001610 Online Payroll Report Replacement	Reports	Planning/Design	9/30/2020	40	Increased Security, Enhanced User	Mike Bohlsen-Information	Kenneth Holloman	Steve Pearson	Medium	Moderate
23	PR0001757 Remapping Job Codes	Kronos	Planning/Design	9/1/2020	35	Process Improvements,	Denise Baker-Human	Mike Bohlsen	Mike Bohlsen	Medium	Moderate
24	PR0001706 Nessus External Vulnerability Remediation	Network	Implementation	6/28/2020	90	Increased Security,	Mike Bohlsen-Information	Devon Larson	Devon Larson	Medium	Critical
25	PR0001644 Phone changes - Portland House	Telecom	Planning/Design	8/31/2020	60	Maintenance	Laurie Woodard-Youth &	Mohammed Jaber	Mohammed Jaber	Medium	High
26	PR0001717 Look for a portable solution for PSS In-Home Service	-Other-	Testing/QA	10/1/2020	10	Process Improvements,	Jill Getty Personal Support	Jim Basa	Jim Basa	Medium	Low
27	PR0001685 Microsoft - Email for LSS Devices Only	Office 365	On Hold	9/1/2020	95	Increased Security,	Mike Bohlsen-Information	Mike Bohlsen	Jeff Rogers	Medium	Moderate
28	PR0001339 Prophix Version 12 Upgrade	Prophix	On Hold	2/1/2021	75	Compliance,	Chris Thompson-Finance	Brian Heigle	Brian Heigle	Medium	Moderate
29	PR0001541 Disaster Recovery: Azure AD	-Other-	On Hold	1/1/2021	50	Increased Security,	Mike Bohlsen-Information	Heidi Leach	Mike Bohlsen	Medium	High
30	PR0001698 Employee Change Risk Analysis - Phase Two	-Other-	On Hold	9/30/2020	15	Compliance, Increased Security,	Ann Terlizi-LSS Risk	Daniel Holmgren	Mike Bohlsen	Medium	Moderate

OPEN

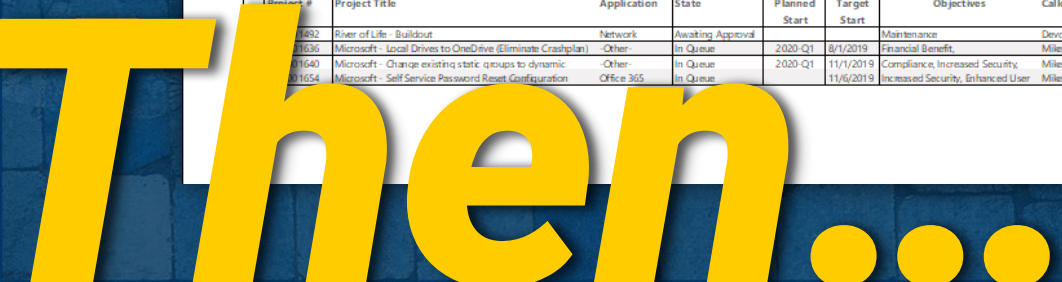
Project #	Project Title	Application	State	Planned Start	Target Start	Objectives	Caller/Department	PM	Technical	Size	Priority
01482	River of Life - Buildout	Network	Awaiting Approval			Maintenance	Devon Larson-Information	Devon Larson	Devon Larson	Large	Moderate
01636	Microsoft - Local Drives to OneDrive (Eliminate Crashplan)	-Other-	In Queue	2020 Q1	8/1/2019	Financial Benefit,	Mike Bohlsen-Information	Heidi Leach	Jeff Rogers	Medium	Moderate
01640	Microsoft - Change existing static groups to dynamic	-Other-	In Queue	2020 Q1	11/1/2019	Compliance, Increased Security,	Mike Bohlsen-Information	Mike Bohlsen	Sharon Bauer	Medium	Moderate
01654	Microsoft - Self Service Password Reset Configuration	Office 365	In Queue		11/6/2019	Increased Security, Enhanced User	Mike Bohlsen-Information	Heidi Leach	Jeff Rogers	Medium	Moderate

Project Sizes: Extra Large, Large, Medium



9/1/2020	Compliance, Increased Security,	Mike Bohlsen-Information	Jeff Rogers	Jeff Rogers	Medium	Moderate
1/1/2021	Increased Security,	Mike Bohlsen-Information	Heidi Leach	Jeff Rogers	Large	Moderate
9/1/2020	Increased Security,	Mike Bohlsen-Information	Mike Bohlsen	Jeff Rogers	Medium	Pending
10/1/2020	Process Improvements, Enhanced	Alexis Oberdorfer-Adoption	Heidi Leach	Joan Khoo	Medium	Pending

Objectives	Caller/Department	PM	Technical	Size	Submitted
Mohammed Jaber-Information	Mohammed Jaber	Mohammed	Medium	7/29/2020	
Kim Watson-Guardianship	Heidi Leach	Mohammed	Large	4/29/2020	
Jody Shalkey-Setpht	Mohammed Jaber	Mohammed	Medium	4/1/2020	
Shannon Kahn-Human	Daniel Holmgren	Daniel Holmgren	Medium	2/27/2020	
Accounting	Steve Pearson	Steve Pearson	Medium	2/7/2020	
Alexis Oberdorfer-Adoption	Daniel Holmgren	Mark Shryock	Medium	1/7/2020	
Peter Samulson	Daniel Holmgren	Paul Dirlewager	Medium	1/3/2020	
Tory Mehta-Partners in	Paul Dirlewager	Paul Dirlewager	Medium	10/14/2019	
Increased Security,	Mike Bohlsen-Information	Heidi Leach	Jeff Rogers	Large	9/11/2019
Compliance,	Mike Bohlsen-Information	Heidi Leach	Jeff Rogers	Large	9/11/2019
Extra Large,	Mike Bohlsen-Information	Heidi Leach	Sharon Bauer	Extra Large	9/11/2019
Information Technology	Heidi Leach	Jeff Rogers	Medium	9/11/2019	
Accounting	Kyle Larsen-Accounting	Mike Bohlsen	Medium	4/23/2019	
Enhanced User Experience,	Kathryn Gasser-Partners in	Paul Dirlewager	Paul Dirlewager	Medium	4/18/2019
Moderate	Padma Tamma-Human	Heidi Leach	Joan Khoo	Medium	4/9/2019
Medium	Padma Tamma-Human	Heidi Leach	Joan Khoo	Medium	4/9/2019
Medium	Padma Tamma-Human	Heidi Leach	Joan Khoo	Medium	4/8/2019
Medium	Padma Tamma-Human	Heidi Leach	Joan Khoo	Medium	4/8/2019
Large	Christiane Pease	Daniel Holmgren	Daniel Holmgren	Large	4/14/2019
Medium	Katie Nichol-Youth & Family	Heidi Leach	Joan Khoo	Medium	4/13/2019
Medium	Human Resources	Joan Khoo	Joan Khoo	Medium	1/2/2019
Medium	Padma Tamma-Human	Heidi Leach	Paul Dirlewager	Medium	1/1/2019
Large	Mike Bohlsen-Information	Heidi Leach	Sharon Bauer	Large	9/24/2018
Large	Tevor Johnson-Behavioral	Cory Weirich	Sherrill Herron	Large	8/9/2018
Large	Mike Bohlsen-Information	Heidi Leach	Paul Dirlewager	Large	8/9/2018
Medium	Ann Terlizi-LSS Risk	Heidi Leach	Paul Dirlewager	Medium	7/31/2018
Medium	Ann Terlizi-LSS Risk	Heidi Leach	Paul Dirlewager	Medium	7/24/2018
Medium	Alexis Oberdorfer-Adoption	Daniel Holmgren	Paul Dirlewager	Medium	2/2/2018
Medium	Cherish Holland-Financial	Heidi Leach	Paul Dirlewager	Medium	12/18/2017
Large	Patrick O'Leary-Youth & Family	Heidi Leach	Paul Dirlewager	Large	3/22/2017
Large	Mike Bohlsen-Information	Heidi Leach	Paul Dirlewager	Large	2/11/2017



Translating “IT-Speak”

Information -> Knowledge

IT Project Summary to Executive Project Dashboard

“What is this IT project?”

Replacing jargon with familiar terms

“Why is this important to me?”

Establish the business value



> Executive Project Dashboard



Detailed Reports

[2023 IT Project List \(sort by Status\)](#)

[2023 IT Project List \(sort by Exec Sponsor\)](#)

[2023 FY Projects YTD](#)

[-2022 FY Projects Complete](#)

[2021 FY Projects Complete](#)

Purpose

To provide LSS leaders with an overview of IT Projects in the current fiscal year. This list is not inclusive of all IT initiatives and may exclude tasks related to Information Security goals, Application maintenance, Technology management, and Service Desk accomplishments.



Management Watch List

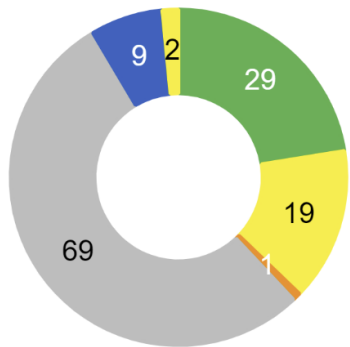
Line of Service	Project Name	Project Health	Exec Sponsor	Health Details
SCS	CRM To the Cloud - SCS	●	Mark	Server cannot sustain long-term use on-prem
Meals	Public Launch of eComm: LSS Meals	●	Roxanne	Delayed to 4/1/2023
	A Project At Risk	●	Mike	Vendor not producing required functionality

Now...



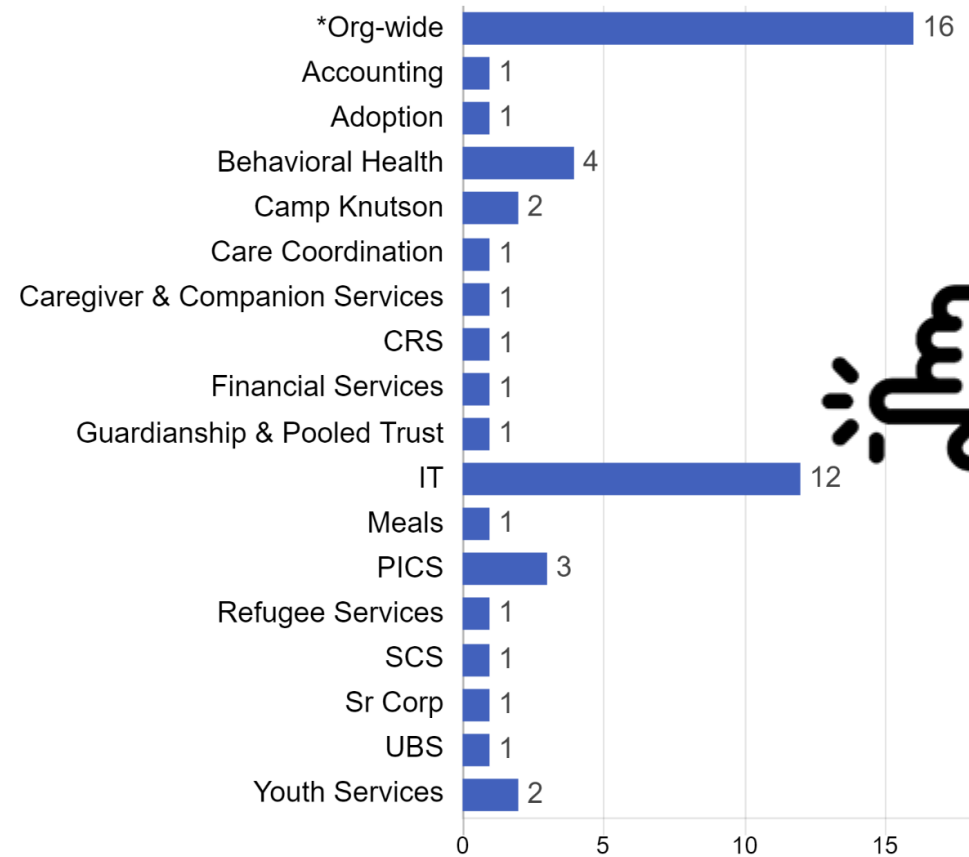
> Executive Project Dashboard

Projects by Status

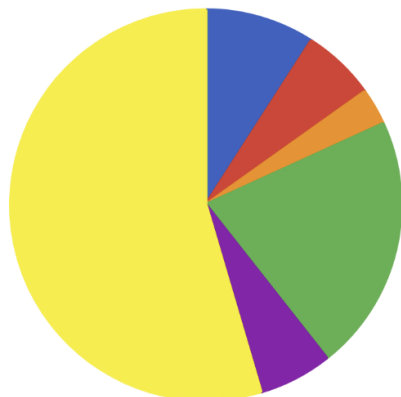


- 1. In Progress
- 2. In Queue
- 3. On Hold
- 4. Request Log
- 5. Completed
- 6. Closed - Incomplete

Active Projects by LOS (in progress, in queue)



{Coming Soon} Sensitive Info Widget

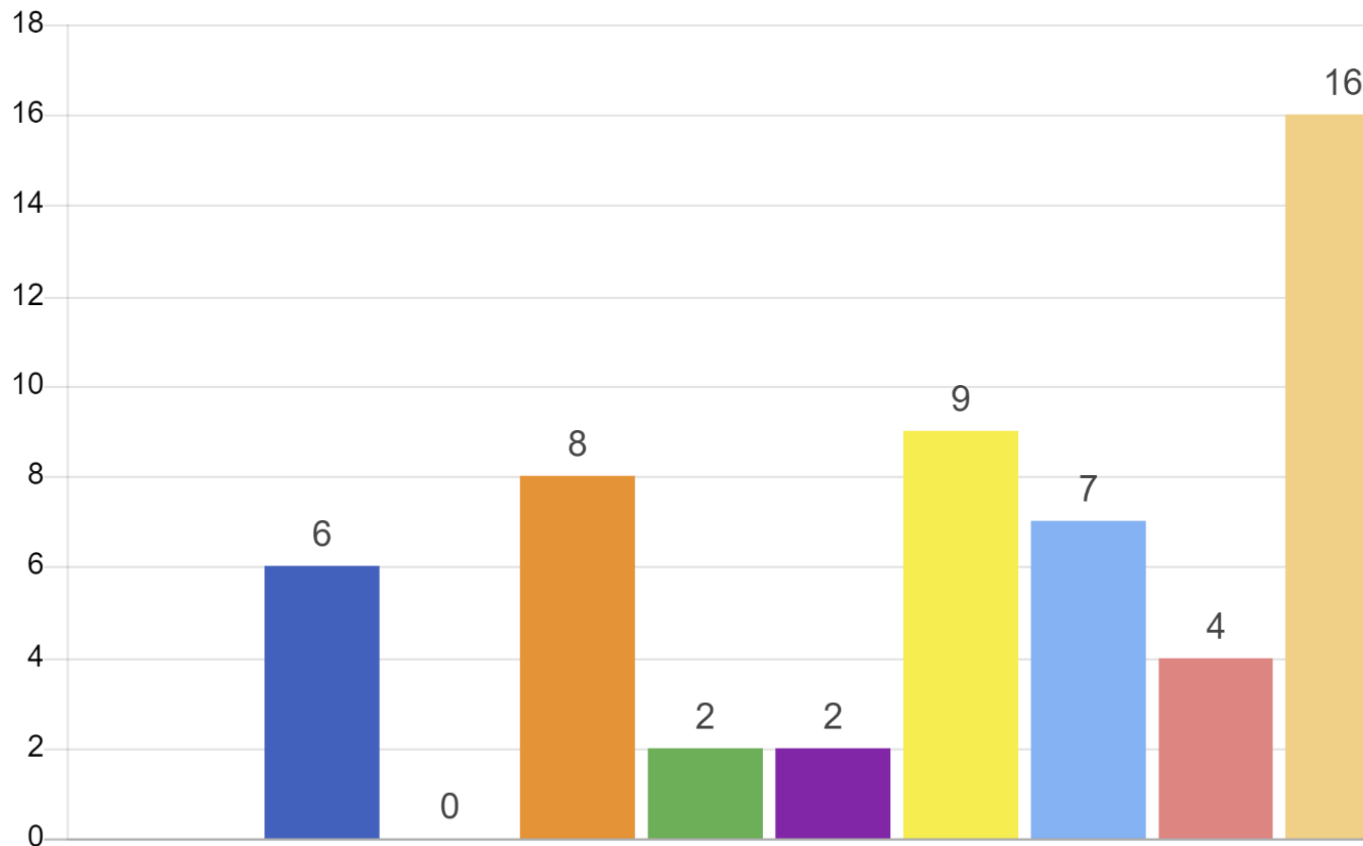


- PCI
- PHI
- PIFI
- PII
- Proprietary
- No Sensitive Info



> Executive Project Dashboard

The Big Picture (Strategic Alignment)



- 3-Year Plan
- Acquisition
- Biggest Possibility
- External Funding (e.g. Grant)
- Breakthrough Goal
- Information Security
- Microsoft Initiative
- State Compliance
- Technology Planning
- Prevention/Early Intervention
- Social Determinants of Health
- Social Justice & Racial Equity



> Executive Project Dashboard

The Measurable Objectives (Operational Value)



> Executive Project Dashboard

The Featured Projects						
Primary	%	Line of Service	Application	Strategic Alignment	Project Health	Operat
Status 1. In Progress						
Shared Drive (file shares) to the Cloud		*Org-wide	Microsoft SharePoint	1-Year IT Plan Microsoft Initiative		RISK M
PICS New Business Systems		PICS	New System	Biggest Possibility 3-Year Plan		OUTCC REVEN
Technology Search for EHR (myEvolv) Replacement		*Org-wide	Evolv New System	1-Year IT Plan		
Teams-Integrated (SMS) Texting Solution		*Org-wide	Microsoft Network	1-Year IT Plan		
UKG: Leave & Attendance Module		*Org-wide	Kronos/UKG			
Docuware Implementation		*Org-wide	Perceptive Content			
External Penetration Testing		IT	Network	1-Year IT Plan		
Status 2. In Queue						
myEvolv On-Premise to Netsmart-Hosted		*Org-wide	Evolv	1-Year IT Plan		PERFC RISK M
Status 5. Completed						
UKG: Recruiting & Onboarding		*Org-wide	Kronos/UKG	3-Year Plan		PRODI QUALI
Better Impact Vendor Evaluation		Refugee Services	New System	Information Security		RISK M
LSS Camp K Magento Upgrade, version 2.4.3 to 2.4.4		Camp Knutson	Adobe Commerce	Technology Planning Information Security		CONTF QUALI



Expanding Our **Network**

**LITN | Lutheran Information
Technology Network**

Send your IT leaders my way!
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THANK YOU

THINK  