SOMTech SMART GOALS (FY21)

smartsheet

	At Risk	SMART GOALS	Primary Owner(s)	Status	Health	% Complete	Progress	Start Date	Completion Date (Planned)	Completion Date (Actual)	Comments
1	🟥	SOMTECH Balanced Scorecard									
2	🏳	FY21				98%		01/01/21	06/30/21		
3	🏳	Application Services		In Progress	🔴	97%		01/01/21	06/30/21		
4	🏳	A. Complete full integration and user training of Cherwell to track all recurrent issues, service requests and escalation workflows.	Bhavesh Patel	In Progress	🔴	95%		01/01/21	06/30/21		
5	🏳	Task 1: Achieve 100% conversion of all requests to Cherwell platform.		Complete	🔵	100%		01/01/21	06/30/21	07/01/20	The new AS intake process officially went live on 6/1/20.
6	🏳	Task 2: Define and implement priority level definitions and escalation steps.		In Progress	🔴	80%		01/01/21	06/30/21		Change request submitted; will continue into FY22.
7	🏳	Task 3: Revise end user help guide and make available online.		Complete	🔵	100%		01/01/21	06/30/21	06/17/21	
8	🏳	Task 4: Increase process awareness (reinforcing following the process; broader communications to AS stakeholders).		Complete	🔵	100%		01/01/21	06/30/21	06/17/21	New Cherwell changes officially implemented and communicated to stakeholders on 6/17/21.
9	🏳	B. Develop actionable metrics, reporting and customer feedback mechanisms.	Bhavesh Patel	In Progress	🔴	95%		01/01/21	06/30/21		
10	🏳	Task 1: Implement Google Analytics for all legacy and future systems.		Complete	🔵	100%		01/01/21	06/30/21	04/16/21	
11	🏳	Task 2: Develop baseline system level metrics.		Complete	🔵	100%		01/01/21	06/30/21	05/14/21	Defined system level data fields; foundation for Goal B/Task 4.
12	🏳	Task 3: Develop customer satisfaction and quality assurance survey.		Complete	🔵	100%		01/01/21	06/30/21	06/17/21	Survey will be sent when Cherwell tickets are closed.
13	🏳	Task 4: Implement dashboard to display system metrics, customer satisfaction and quality assurance data.		In Progress	🔴	80%		01/01/21	06/30/21		Change request submitted; will continue into FY22.
14	🏳	C. Enact a disciplined, internal project management process to assist with requirements gathering, accurate forecasts of projected software development time and labor and scope estimates for user consultations.	Bhavesh Patel	Complete	🔵	100%		01/01/21	06/30/21	06/04/21	
15	🏳	Task 1: Standardize requirements gathering documentation and storage of these documents/templates.		Complete	🔵	100%		01/01/21	06/30/21	05/14/21	Azure DevOps is source for these documents.
16	🏳	Task 2: Assess task and time tracking features in DevOps for all maintenance and new projects.		Complete	🔵	100%		01/01/21	06/30/21	06/04/21	
17	🏳	Task 3: Standardize and improve estimation process.		Complete	🔵	100%		01/01/21	06/30/21	05/03/21	PMO provided 2 training work shops on estimating.
18	🏳	AV & Classroom Support (AV&C)		Complete	🔵	100%		01/01/21	06/30/21	06/11/21	
19	🏳	A. Implement Cherwell to track all recurrent issues, service requests and escalation workflows; ensure all SOM departments and users are trained on usage and escalation policy.	Jay Diener-Brazelle	Complete	🔵	100%		01/01/21	06/30/21	06/07/21	
20	🏳	Task 1: Get training for Cherwell for staff.		Complete	🔵	100%		01/01/21	06/30/21	04/14/21	
21	🏳	Task 2: Work with Central TS to get request workflow updated in Cherwell.		Complete	🔵	100%		01/01/21	06/30/21	06/07/21	
22	🏳	Task 3: Begin entering tasks into Cherwell and modify tracking based on team feedback.		Complete	🔵	100%		01/01/21	06/30/21	05/13/21	
23	🏳	Task 4: Begin migrating all user requests into ticketing system.		Complete	🔵	100%		01/01/21	06/30/21	06/07/21	
24	🏳	B. Develop SLAs with SOM departments and align tools and software to better enable work at remote locations.	Jay Diener-Brazelle	Complete	🔵	100%		01/01/21	06/30/21	06/11/21	
25	🏳	Task 1: Evaluate resource commitments at remote location.		Complete	🔵	100%		01/01/21	06/30/21	05/10/21	
26	🏳	Task 2: Create template of SLA for support of remote areas.		Complete	🔵	100%		01/01/21	06/30/21	06/09/21	
27	🏳	Task 3: Begin to approach units to negotiate SLA.		Complete	🔵	100%		01/01/21	06/30/21	06/11/21	
28	🏳	C. Develop actionable metrics, reporting and customer feedback mechanisms.	Jay Diener-Brazelle	Complete	🔵	100%		01/01/21	06/30/21	04/28/21	
29	🏳	Task 1: Work with Curriculum to obtain Course Director information; create and distribute survey.		Complete	🔵	100%		01/01/21	06/30/21	11/16/20	
30	🏳	Task 2: Create report back structure to look at survey results and determine if anything is actionable.		Complete	🔵	100%		01/01/21	06/30/21	04/28/21	
31	🏳	Client Services		Complete	🔵	100%		01/01/21	06/30/21	06/21/21	
32	🏳	A. Implement a full suite of SmartSheet tracking spreadsheets and other project management tools to modernize Client Services' operations for transparent decision making.	Steve Kuchta, vann.wheeler@vcuhealth.org	Complete	🔵	100%		01/01/21	06/30/21	06/21/21	
33	🏳	Task 1: Reoccuring meetings with PMO to ensure best practices and projects are implemented using SOMTech project management tools.		Complete	🔵	100%		01/01/21	06/30/21	07/01/20	Actual start date of recurring meetings with PMO is 6/10/20.

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34	🏳	Task 2: Move project decision making to SmartSheet and Planner to ensure transparency amongs Client Services.		Complete	🔵	100%	▬	01/01/21	06/30/21	09/01/20	
35	🏳	Task 3: Create SOPs for modern PM processes and procedures to ensure consistency within Client Services.		Complete	🔵	100%	▬	01/01/21	06/30/21	06/21/21	
36	🏳	Task 4: Achieve 100% implementation and management of all projects within SmartSheet and/or Planner.		Complete	🔵	100%	▬	01/01/21	06/30/21	06/21/21	
37	🏳	**B. Develop SLAs with SOM departments to manage expectations and align tools and software to better enable work at remote locations.**	Steve Kuchta, vann.wheeler@vcuhealth.org	**Complete**	🔵	**100%**	▬	**01/01/21**	**06/30/21**	**06/21/21**	
38	🏳	Task 1: Identify responsibilities of SOMTech with ticket management, hardware/software/network/printer support.		Complete	🔵	100%	▬	01/01/21	06/30/21	04/05/21	
39	🏳	Task 2: Identify responsibilities of departments with ticket management, hardware/software/network/printer support.		Complete	🔵	100%	▬	01/01/21	06/30/21	01/18/21	
40	🏳	Task 3: Document expected support procedures, escalation process, and communication timeline.		Complete	🔵	100%	▬	01/01/21	06/30/21	06/14/21	
41	🏳	Task 4: Complete baseline CS SLA.		Complete	🔵	100%	▬	01/01/21	06/30/21	06/21/21	
42	🏳	**C. Develop actionable metrics, reporting and customer feedback mechanisms.**	Steve Kuchta, vann.wheeler@vcuhealth.org	**Complete**	🔵	**100%**	▬	**01/01/21**	**06/30/21**	**05/28/21**	
43	🏳	Task 1: Identify and document metrics and procedures to evaluate CS technicians on their customer service skills.		Complete	🔵	100%	▬	01/01/21	06/30/21	05/28/21	
44	🏳	Task 2: Identify and document metrics and procedures to evaluate CS technicians on their productivity.		Complete	🔵	100%	▬	01/01/21	06/30/21	05/28/21	
45	🏳	Task 3: Refine our approach to using available metrics and identify new metrics.		Complete	🔵	100%	▬	01/01/21	06/30/21	05/28/21	
46	🏳	Task 4: Implement management processes with Client Services staff to improve metrics.		Complete	🔵	100%	▬	01/01/21	06/30/21	05/24/21	
47	🏳	**Project Management Office (PMO)**		**Complete**	🔵	**100%**	▬	**01/01/21**	**06/30/21**	**06/25/21**	
48	🏳	**A. Establish recurring productivity meetings with SOMTech units to reinforce PM processes and support any ongoing strategic needs which the PMO can fulfill.**	Lynne Jeffries	**Complete**	🔵	**100%**	▬	**01/01/21**	**06/30/21**	**02/02/21**	
49	🏳	Task #1: Schedule recurring bi-weekly productivity meetings with each SOMTech unit Supervisor/Director starting with Client Services.		Complete	🔵	100%	▬	01/01/21	01/29/21	01/27/21	*Began recurring biweekly meetings starting with Client Services on 6/10/20.*
50	🏳	Task #2: Identify and document strategic needs for each unit on an ongoing basis and review with Asst. Dean of SOMTech.		Complete	🔵	100%	▬	01/01/21	06/30/21	02/02/21	*Ongoing review with Wies in our 1:1 meetings.*
51	🏳	**B. Create a centralized SLA catalog and portfolio of all existing SOMTech work agreements and contracts to be periodically reviewed by the SOM IT Steering Committee (ITSC).**	Lynne Jeffries	**Complete**	🔵	**100%**	▬	**01/01/21**	**06/30/21**	**06/25/21**	
52	🏳	Task #1: Identify tool/repository for catalog of SLA and agreements/contracts within first 90 days of calendar year 2021.		Complete	🔵	100%	▬	01/01/21	03/31/21	04/22/21	*Confirmed decision to set up Document Library in Sharepoint with assistance of VCU Health IT (Wies initially tried another solution which was not feasible).*
53	🏳	Task #2: Perform assessment and inventory of existing SLA related documents and work agreements/contracts.		Complete	🔵	100%	▬	01/01/21	06/30/21	04/21/21	*Identified and organized all relevant documents in OneDrive prior to uploading to new document library.*
54	🏳	Task #3: Migrate existing documents to new, central location by end of FY21.		Complete	🔵	100%	▬	01/01/21	06/30/21	06/25/21	*Created both draft and final version document libraries on new SOMTech Sharepoint site. Work flow for a document review/approval process will be implemented in FY22.*
55	🏳	**Research Systems**		**Complete**	🔵	**100%**	▬	**01/01/21**	**06/30/21**	**06/29/21**	
56	🏳	**A. Establish recurring and organized workgroup meetings to support the enterprise implementation of the VCU Research Computing Center (RCC).**	James Percy	**Complete**	🔵	**100%**	▬	**01/01/21**	**06/30/21**	**06/29/21**	
57	🏳	**Simulation Technology**		**In Progress**	🔴	**90%**	▬	**01/01/21**	**06/30/21**		
58	🏳	**A. Complete research and tool implementation for tracking mannequin utilization.**	Justin Fedoryk	**Complete**	🔵	**100%**	▬	**01/01/21**	**06/30/21**	**06/14/21**	
59	🏳	Task 1: Identify all necessary inventory that would need to be tracked and assign a unique identifier to each item.		Complete	🔵	100%	▬	01/01/21	06/30/21	06/14/21	
60	🏳	Task 2: Research best options for implementation of the tracking, based on center's needs.		Complete	🔵	100%	▬	01/01/21	06/30/21	02/02/21	
61	🏳	Task 3: Import inventory data into the system selected and begin tracking utilization.		Complete	🔵	100%	▬	01/01/21	06/30/21	06/14/21	
62	🏳	**B. Implement a revised, streamlined and fully integrated room scheduling process and reservation system.**	Justin Fedoryk	**In Progress**	🔴	**70%**	▬	**01/01/21**	**06/30/21**		
63	🏳	Task 1: Complete Project Charter for "Simulation AV/LMS Upgrade" project and work with SIM Staff to research options for the best vendors.		Complete	🔵	100%	▬	01/01/21	06/30/21	02/10/21	
64	🚩	Task 2: Facilitate install of new equipment and implementation of LMS, detailed in the "Simulation AV/LMS Upgrade", by having project meetings and requesting feedback from SIM staff throughout the process.		In Progress	🔴	25%	▬	01/01/21	06/30/21		*Change request submitted; will continue into FY22.*
65	🏳	Task 3: Modify data structure from current LMS into the new system to improve data quality.		In Progress	🔴	85%	▬	01/01/21	06/30/21		*Change request submitted; will continue into FY22.*

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66	⚑	C. Develop actionable metrics, reporting and customer feedback mechanisms.	Justin Fedoryk	Complete	🔵	100%	▬▬	01/01/21	06/30/21	04/29/21	
67	⚑	Task 1: Identify and define initial metrics/KPI's measuring customer satisfaction.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	04/15/21	
68	⚑	Task 2: Enhance the feedback request form into normal simulation workflow and distribute this information to instructors and units that utilize the center for events.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	04/29/21	
69	⚑	Web Services & Communications		In Progress	🔴	96%	▬▬▬	01/01/21	06/30/21		
70	⚑	A. Establish recurring coordination meetings with VCU Health Web Marketing team to reinforce relationship and support Faculty directory needs, digital asset sharing and ownership.	Christopher Lowry	Complete	🔵	100%	▬▬	01/01/21	06/30/21	06/29/21	
71	⚑	Task 1: Build prototype website integrated with new FARES 3.0 system.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	06/01/21	
72	⚑	Task 2: Perform digital asset needs assessment - storage, retrieval, taxonomy, etc.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	06/29/21	
73	⚑	Task 3: Establish recurring meetings with VCUHS team.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	06/29/21	
74	⚑	B. Develop and research end-user and client-side satisfaction surveys to measure, track and aggregate qualitative analytics for client success and user satisfaction. Implement at least 1 survey by end of FY21.	Christopher Lowry	In Progress	🔴	83%	▬▬▬	01/01/21	06/30/21		
75	⚑	Task 1: Create and implement internal client success survey.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	10/22/20	
76	⚑	Task 2: Research and develop goals for end-user satisfaction survey - external site.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	06/20/21	
77	⚑	Task 3: Implement end-user survey on SOM website.		In Progress	🔴	80%	▬▬▬	01/01/21	06/30/21		*Put in change request to move this to FY22*
78	⚑	Task 4: Analyze collected data.		Not Started	🔴	50%	▬▬	01/01/21	06/30/21		*Put in change request to move this to FY22*
79	⚑	C. Formalize a more rigorous project management methodology to balance large site build projects against other operational needs to increase work efficiencies.	Christopher Lowry	Complete	🔵	100%	▬▬	01/01/21	06/30/21	06/29/21	
80	⚑	Task 1: Establish regular meetings with SOM Tech PMO.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	02/02/21	
81	⚑	Task 2: Standardize and measure operations work in Cherwell.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	03/31/21	
82	⚑	Task 3: Create work breakdown baselines for dev/ops team (e.g. Ops/Dev/EmpDev time)		Complete	🔵	100%	▬▬	01/01/21	06/30/21	06/29/21	
83	⚑	Task 4: Standardize dev work planning and tracking tool.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	05/01/21	
84	⚑	Task 5: Report and analyze data from dev/ops tools and refine processes.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	06/29/21	
85	⚑	D. Expand the role, engagement and interactivity of the Web Community of Practice to empower SOM departments.	Christopher Lowry	Complete	🔵	100%	▬▬	01/01/21	06/30/21	06/29/21	
86	⚑	Task 1: Establish regular quarterly cadence for CoP meetings.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	09/09/20	
87	⚑	Task 2: Standardize CoP platform and build adoption - posts, knowledge capture, files, etc.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	06/09/21	
88	⚑	Task 3: Create measures and reports to assess engagement.		Complete	🔵	100%	▬▬	01/01/21	06/30/21	06/29/21	*Measuring meeting participation rate and use of the Teams site*