IT Transformation Program Update

All ITTP Meeting
June 15, 2004

Based on EBC presentation material:
Context on May 26, 2004
Questions/Considerations on June 24, 2004
Where We’ve Been

Fall 2003:
Phase I, Data Collection and
Service Delivery Model Vision
Business Case

We aim to create a new IT Service Delivery Model that offers:

- Consistency and Predictability in Customer Service Levels within Service Categories
- Improved IT Alignment and Value
- Better IT Cost Management
- Improved Risk Management
- A Dynamic, Learning IT Organization
Where We Are Now

• We are committed to a view that is focused on faculty, staff and students.
• We want to build on the existing relationships and make them more strategic.
• We want to present a dynamic catalog of services that are responsive to client needs.
• We will standardize for efficiencies where it aligns with campus strategy.
• Services must be maintained in the local unit through any transition.
Where We Are Now

We have designed an IT Service Delivery Model that is characterized by:

- A single, unified, integrated client relationship model
- New, redefined and standardized IT roles for client interaction
- Formal definition of a standard catalog of IT services
- New IT Governance model
The IT Service Delivery Model

CLIENT CENTRIC

Faculty, Staff or Student

Client Services

Services

IT SERVICES BASED

Within the IT Organization

Processes

People

Tools/Technology

Other Services

Line of Visibility

Service Catalog
Client Interaction
Behind the Scenes (new)
Scenarios

Scenario: "My computer is slow"
Scenarios

Scenario:
New Employee, Desktop/LapTop
Scenarios

Scenario:
New Faculty Member,
Instructional Support

HelpDesk
Self service
on Web
Phone
Email
Walk-In

Service Mgrs
Workstation
Support
Service Mgr
Service Mgr
Instructional
Services

Divisional
Liaison
Local IT
Specialist

Workstation
Field Techs

Common
Tracking
System

- Course website
- Classroom
equipment reservation
- Student computing
  lab software request

Specialized
Support

Instructional
Package
Scenarios

Scenario:
Existing Faculty Member
Instructional Support
Scenarios

Scenario: Specialized Software Support

An Economics PhD needs SAS support
Scenarios

Scenario: UCOP Data Report Request
Scenarios

Scenario: New Point of Sale System

HelpDesk
- Self service on Web
- Phone
- Email
- Walk-in

Workstation Field Techs

Service Mgrs
- Workstation Support
- Service Mgr
- Service Mgr
- Service Mgr

Divisional Liaison

Local IT Specialist

Common Tracking System

Other Divisional Liaisons
- Security Engineer
- Application Development Group

Specialized Support
Scenarios

Scenario: Student Network Jack Reconnection

HelpDesk
- Self service on Web
- Phone
- Email
- Walk-In

Network Port Database
ResNet Manager
Networking or Security Staff

Service Mgrs
- Workstation Support
- Service Mgr
- Service Mgr
- Service Mgr.

Workstation Field Techs

Divisional Liaison
Local IT Specialist

Specialized Support
What is an IT Service?

- A service is an IT function done for a customer that provides value.
- A service is a measurable “product” which is the basis of doing business with the customer.
- A service is delivered through a series of implemented processes and/or activities.
- A service is what the campus is willing to pay for.

Example: Help Desk Service

Source: (Adapted from) Managing Information Technology Services, IBM Global Services,
IT Service Catalog
### IT Service Catalog (Excerpt)

<table>
<thead>
<tr>
<th>Service Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting Help and Support</td>
<td></td>
</tr>
<tr>
<td>Troubleshooting</td>
<td>th the phone, when or mail access to telephone support available.</td>
</tr>
<tr>
<td>Software Support</td>
<td>th the IT team to know when we *this does not cover the error on database as well as the ability to receive services and improve those results.</td>
</tr>
<tr>
<td>IT Training</td>
<td>in the training CTRS to our customers included that they have the use of the tools that work.</td>
</tr>
<tr>
<td>Hardware subscription</td>
<td>Hardware support and support for software packages provided by the product-oriented service center.</td>
</tr>
<tr>
<td>Software subscription</td>
<td>Software packages provided by our product-oriented software center.</td>
</tr>
<tr>
<td>Technical Support</td>
<td>Technical support center is designed to provide technical support to our customers.</td>
</tr>
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<td>Technical Support</td>
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</tbody>
</table>

### Solutions using IT

<table>
<thead>
<tr>
<th>Solution</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operational technology</td>
<td>The solution is the project to enable a solution that is inclusive.</td>
</tr>
<tr>
<td>Application development</td>
<td>The application to provide a solution that is inclusive.</td>
</tr>
<tr>
<td>Application development</td>
<td>The application to provide a solution that is inclusive.</td>
</tr>
<tr>
<td>Technical support</td>
<td>Technical support center is designed to provide technical support to our customers.</td>
</tr>
</tbody>
</table>

### Keeping IT Going

<table>
<thead>
<tr>
<th>Keeping IT Going</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Maintenance</td>
<td>Application maintenance services provided by our product-oriented service center.</td>
</tr>
<tr>
<td>Application Maintenance</td>
<td>Application maintenance services provided by our product-oriented service center.</td>
</tr>
<tr>
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<td>Application Maintenance</td>
<td>Application maintenance services provided by our product-oriented service center.</td>
</tr>
</tbody>
</table>

### Building Blocks

<table>
<thead>
<tr>
<th>Building Blocks</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program and project</td>
<td>The program and project management plan is designed to provide a solution that is inclusive.</td>
</tr>
<tr>
<td>Project management</td>
<td>Project management services provided by our product-oriented service center.</td>
</tr>
<tr>
<td>Project management</td>
<td>Project management services provided by our product-oriented service center.</td>
</tr>
<tr>
<td>IT portfolio management</td>
<td>IT portfolio management is designed to provide a solution that is inclusive.</td>
</tr>
</tbody>
</table>

5/24/2004  Page 1  DRAFT for discussion only
Anatomy of an IT Service

**SERVICE**
- Elements
  - The features and functions of the service
    - Enables us to design service delivery processes

**Attributes**
- Describe the scope and boundaries of each service element
  - Enables us to define IT service levels, roles and measurement

**Deliverables**
- The main results or outputs of the service
  - Enables definition of the service value proposition

**Cost**
- The funding required to provide the service
  - Enables us to cost the service.

UC SANTA CRUZ
Anatomy of an IT Service - Example

<table>
<thead>
<tr>
<th>SERVICE</th>
<th>Elements</th>
<th>Attributes</th>
<th>Deliverables</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Project &amp; Program Management</td>
<td>Project &amp; Program Planning</td>
<td>Program &amp; Project Feasibility Analysis completed.</td>
<td>Detailed Project / Program Plan &amp; Charter describing scope, timeline and approach</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Broker/Coordinate with other IT functions for specific expertise</td>
<td>Specific Resource Assignments Made</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Project &amp; Program Management</td>
<td>A responsible IT Project Manager or Program Manager will be assigned for the duration of every IT Project and Program to manage their successful completion.</td>
<td>IT Projects and Programs will be managed for the client from start-up to conclusion.</td>
<td>IT specialist effort FTE’s will be included in the respective IT Services being rendered.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Required IT specialists will be assigned to the project team to perform specific roles and tasks.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Methodology &amp; Tools Management</td>
<td>The standard IT program &amp; project management methodology, tools and standards will be applied.</td>
<td>Professional, high quality, effective Project and Program Management.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Program &amp; Project Monitoring and Reporting</td>
<td>A standard process and approach for managing projects will be defined and evolved to ensure project management quality and consistency across campus.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Standard software and other tools provided to support the project management process.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reporting Interval</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Regular Reports</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>PM effort (FTE’s) and SW tools included in Bronze support.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
From IT Services to Costs & Processes
IT Services Costs
Governance
The IT Organization - Capabilities
The IT Organization (Handout)

who we are

we are an IT organization providing...
* reliable services and support for the faculty, students, and staff who make UC Santa Cruz an institution of educational and research excellence.
* a dynamic catalog of services responsive to our clients' varied technology needs.
* enthusiastic people who produce extraordinary results.
* strategic planning and technical direction for successful integration of new technologies.
* innovation and leadership in information technology services.
* seamless delivery of services to the campus community across multiple platforms.
* opportunities for the campus to communicate with alumni, parents, friends, and the global community by making our work more visible and accessible.

we value a workplace where...
* our success is measured by the success of our clients.
* independent thinking is fostered and collaborative partnerships are the norm.
* people listen respectfully and are able to speak freely and candidly.
* mistakes become learning opportunities.
* clearly identified and varied career paths are offered.
* individuals know that they can truly make a difference.
* people are promoted and rewarded based on their skill and dedication to providing a high standard of service.
* a healthy work-life balance is possible.
* staff are provided training and mentoring to work effectively with others and to keep pace with rapidly changing technology.
* both stability of services and innovative solutions are vital.
* people feel free to express themselves and have fun.

we value people who...
* care about each other, the quality of our services, and our clients' satisfaction.
* lead by example.
* are committed to a strong work ethic and strive to excel.
* give credit where credit is due.
* treat each other with mutual respect and dignity.
* demonstrate candor, insight, and adaptability and thrive in a challenging environment.
* are confident about their abilities and optimistic about the outcomes of their efforts.
* find enjoyment in their work and are team players.

we aspire to be known as an IT organization that...
* has the highest standards of moral and ethical conduct.
* provides superior quality service to our clients by anticipating their needs, responding to their feedback, and enabling them to work in harmony with IT.
* attracts the best people who flourish in a stimulating environment.
* has leaders who embody the highest values of the organization.
* people can trust – doing what we say and assuming accountability. We keep our promises.
* communicates effectively within the division and beyond.
* views us as an interconnected unit, continually enhancing knowledge and services in response to the campus community.
* respects diversity in the quest for knowledge.

“We are in the knowledge business. Our business is the creation, dissemination, and use of knowledge.” — Martin M. Clamer, Acting Chancellor

May 27, 2004
www信息技术Handout.com
Looking Forward: Questions/Considerations

• Funding/Costing
• Governance
• Implementation Approach
• Cultural and Organizational Change
Funding/Costing

• What will it cost (in process)?
• What size is the envelope?
## Funding/Costing (cont’d)

<table>
<thead>
<tr>
<th></th>
<th>Cost Management</th>
<th>Tradeoff $$ with….</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Client Services</strong></td>
<td>• Adjust service levels (scenarios)</td>
<td>• Value of service to client</td>
</tr>
<tr>
<td></td>
<td>• Change implementation phase</td>
<td>• Change for client.</td>
</tr>
<tr>
<td></td>
<td>• Phase or reprioritize</td>
<td></td>
</tr>
<tr>
<td><strong>Internal services</strong></td>
<td>• Adjust service levels</td>
<td>• Campus risk</td>
</tr>
<tr>
<td></td>
<td>• Change implementation phase</td>
<td>• Value of service to client</td>
</tr>
<tr>
<td></td>
<td>• Phase or reprioritize projects or services</td>
<td>• Realization of efficiencies</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Infrastructure dependencies</td>
</tr>
<tr>
<td><strong>Other existing services</strong></td>
<td>• Budgetary changes that modify existing services levels</td>
<td>• Value of service to client</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Infrastructure dependencies</td>
</tr>
<tr>
<td><strong>Campus Initiatives</strong></td>
<td>• Phase or reprioritize</td>
<td>• Campus impact, e.g. efficiencies, enablement, innovation</td>
</tr>
</tbody>
</table>
Governance

• **How do we keep it nimble?**
  • Three levels of governance: strategic, operational, technical

• **Priority and funding decisions at the strategic level**
  • Key to alignment of IT with campus
  • What is appropriate consultation?
  • How are current reserves used?
  • What are priorities for savings/efficiencies?
    • Campus
    • IT infrastructure
    • IT quality of service
Implementation

• Three aspects
  • Organizational change
    • From distributed to consolidated
  • Service change
    • From existing through ramp-up to Bronze
  • Clients view
    • What the clients see and when

• Constraints and Principles
  • Maintaining services
  • Openness of process
  • Closed system for resources
Implementation (cont’d)

• How fast and with what effect on clients?
  • Add capacity OR create and use capacity?
  • Tradeoff $$ with speed and changes to client
Cultural and Org Change

• Setting Clients/Campus Expectations
  • During Transition
    • Funding and budgets
    • Phasing of change
  • Ongoing
    • Bronze and bronze+
    • Best of centralized and localized services from a consolidated organization
  • Throughout
    • Service levels
    • Communication, assessment
    • Alignment
Cultural and Org Change

- The IT organization
  - Who’s in/who’s out?
  - Developing the IT organization
    - Process to fill positions – recruitment or appointment.
    - Need for training
    - Promoting a client focus
    - Transitioning to services and service levels
To ITTP Teams:

• Reminder about Town Hall, June 29, with Chancellor Chemers.

• Nothing huge is going to happen on July 1!

Questions?
Thoughts?