Staff Transition Status Report

University of California, Santa Cruz
Staff Transition

For period: May, 2006
Submitted by: Ann Berry-Kline
Distribution: Bill Hyder, ITTP PMs, DLs, SMT

<table>
<thead>
<tr>
<th>Status Item</th>
<th>Current Status</th>
<th>Prior Status</th>
<th>Status Notes:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Project Status</td>
<td>Red</td>
<td>Yellow</td>
<td>- Overall Status: Small steps towards progress were made this month. The unresolved project risks and the amount of work to be completed this month put the project in the red zone.</td>
</tr>
<tr>
<td>Schedule</td>
<td>Red</td>
<td>Yellow</td>
<td>- Schedule Performance: The amount of work in the near future that needs to happen is ambitious and depends on many groups pulling together in the same direction.</td>
</tr>
<tr>
<td>Budget</td>
<td>Yellow</td>
<td>Yellow</td>
<td>- Budget Performance: The project’s budget (FTE and Provision $) is currently known.</td>
</tr>
<tr>
<td>Project Risk</td>
<td>Red</td>
<td>Red</td>
<td>- Project Risks: See Key Issues and Resolutions. Many risks exist that put the project in jeopardy of completing as planned.</td>
</tr>
</tbody>
</table>

Accomplishments Since Last Report:
- The “Priming of the Pump” or rotations plan in the Support Center was set aside given the 6 new hires that started in late March. The new hires are being trained in Support Center activities. A new plan for cross training and IT Request deployment has been determined. It will be presented to SMT and the DLs in June.
- Brad Smith presented Core Technologies view on services supported based on FTE at the 5/22 SM/DL meeting. As a result of the preparation work, Brad realized the need to restructure the services listed in the service catalog. Brad and Aaronethe new IT Service Manager for Infrastructure will be working on this.
- Pat LeCuyer further developed his plan for services based on FTE and presented at the 5/22 SM/DL meeting.
- The DLs worked on normalizing the services that were listed in the serv tool with the services listed in the service catalog.
- A staff transition template was developed and handed out at the 5/22 SM/DL meeting. It will be used to clearly communicate.
- A 6/1 meeting was held to continue to work on normalizing the services in the serv tool to the services listed in the service catalog. The DLs and Support Center folks then started to work on a draft version of hw/sw standards, service levels and gap analysis for desktop support services.
- A web page for the Staff Transition project was created. It is located at [http://its.ucsc.edu/transformation/staff_transition.php](http://its.ucsc.edu/transformation/staff_transition.php).

Upcoming / Next Steps:
- The Staff Transition Project Charter needs to be completed. Ann will do the rewrite and have the SMs/DLs review it. It will go to SMs for final approval there after.
- Prepare for and hold the 6/6 SM/DL meeting. The objective of this meeting will be to continue to work on normalizing the services, developing service levels for normalized services and gap analysis.
- Several more working meetings with DLs and core ITS groups will be necessary to work through normalizing services, service levels definition, gap analysis and develop of SLAs for each division by 7/1.

Key Issues and Resolutions:
- As we discuss the kinds of work undertaken by current staff, how do we accommodate matrix management processes in the way we [assign work] + [manage staff] = service-based management? 5/31 – This issue is being escalated to critical as we try to move forward with the staff transition. As we look at how to support services, each area within ITS is in a different place as far as implementing processes to support services. The uneven placement is causing issues in our ability to deploy a service.
needs to complete their work on the service catalog before the DLs will look at normalizing services. After that service levels and gap analysis needs to happen. SLAs will probably be written without these pieces in place.

- When a division “gives up” resources to the center, what’s the decision about the scope of the services provided by “John Doe”? How are service levels defined for divisions? 4/29 – This was, in part, under discussion of the last SM/DL meeting. It is up to the unit manager informed by governance as to which services most important to a given areas work load. 5/31 – In the future, Application Solutions will set up and use governance on a per division basis to help set priorities. IT Service Managers will also have the responsibility to help understand priorities for a service area. In the near term, the DLs are meeting with core ITS units to determine service levels and gap analysis for each service provided. This information will feed the divisional SLAs.

- DLs will be managing staff that support servers for “at least another year” as CT develops the central server service (unless as-needed, case by case). How will CT create and communicate expectations for service management standards in this interim period? 4/29 – This was discussed at the SM/DL meeting at length. One of the actions of the meeting is to have CT come into alignment with CRM and Application Solutions. 5/31 – CT still needs to come into alignment with CRM and Application Solutions as far as supporting services. This remains a critical issue. Also a server inventory is being compiled and will be assessed for risk and resource planning. Migration plans are needed.

- What principles inform how/when staff who are generalists start to become specialists? 5/31 – For the most part, people will be in their new roles between 7/1 and the start of fall quarter. The Staff Transition Plan will state the details of when/to where/ from what workload/to what workload/what training is needed.

- The Staff Transition Project Charter has not been completely written. It has not been vetted and approved by SMT. 5/31 – No progress on this issue was made this month.

### Closed Issues and Resolutions

- The assignments of staff, at least those in this first transition for Support Center, need to be solidified. Rotations are being based on specific divisions, competencies and geographic location. 4/29 – The first SM/DL meeting slotted staff to positions. The second SM/DL meeting looked at FTE available to provide specific services. Because of this new approach, rotations may not be necessary. 5/31 – Rotations or Priming the Pump plan has been set aside with 6 new hires starting in Support Center. There is a challenge that remains to mine the divisional knowledge for desktop support and other duties that remain within the divisions.

- The deliverables for the first phase of the Desktop Support Project need to be in place before the rotations can begin. The project plan is being written. It is not known if the deliverables will be ready in conjunction with the start of the rotations. 4/29 – The project charter is being presented to Bill Hyder, the sponsor on Tuesday, May 2. 5/31 – The desktop support project charter was presented to SMT and approved. The charter was also presented to the DLs. A new plan exists in place of the rotations.

- How do we disentangle partial FTE and multiple assignments so that staff can begin to transition? 5/31 – This has mostly been worked out between the DLs and core ITS units.

### Key Upcoming Milestones:

<table>
<thead>
<tr>
<th>Key Upcoming Milestones:</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finalize Staff Transition Project Charter for SMT approval</td>
<td>6/xx</td>
</tr>
<tr>
<td>SM/DL/Core ITS meetings to continue to work on service levels, gap analysis, and SLAs</td>
<td>6/6, 6/7, 6/?</td>
</tr>
<tr>
<td>Services supported and service levels defined</td>
<td>7/1</td>
</tr>
<tr>
<td>Prepare for and train transitioning staff</td>
<td>7/1-9/1</td>
</tr>
</tbody>
</table>

---

**Ann Berry-Kline**  
Project Manager

**Bill Hyder**  
Project Sponsor (if applicable)