IT Transformation Program (ITTP)

Phase II: Migration and Planning Report

August 2004
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This has been an exciting and challenging year for everyone who has participated in the IT Transformation Program. Phase II consisted of nearly a hundred dedicated people who went above and beyond the call of duty make this project a success. ITTP wants to thank those who worked many hours to create the new services-based, client-focused IT organization.

Special thanks to the following: (alphabetical)

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AVCOR Consulting
Campus Leadership
Change Management Team
Department Managers
Envoys
Erickson Consulting
Executive Budget Committee
Gartner Inc.
ITTP Steering Committee
ITTP Teams
LASSO

And all others who provided insightful feedback during Phase II of the transformation program.
Executive Summary

UC Santa Cruz continues to evolve as a world-class research university while facing extraordinary challenges, including pressure for enrollment growth during a significant downturn in state funding. Information Technology (IT) at UC Santa Cruz is a vital partner in developing creative and innovative ways to meet these challenges.

The Executive Budget Committee (EBC) and its support teams are focused on transformation projects designed to position the campus for growth and development, to improve its processes and services, and to avoid unnecessary costs. The IT Transformation Program (ITTP) is a major initiative under the Executive Budget Committee (EBC).

The IT Transformation Program (ITTP) started in July 2003 and consists of three phases:

- **Phase I: Data Collection and Service Design Visioning** (July–December 2003)
- **Phase II: Migration and Planning** (January–June 2004)
- **Phase III: Implementation and Transition Planning** (July–December 2004)

ITTP aims to create a new IT service delivery model that offers consistency and predictability in client service levels within service categories, improved accountability and efficiency, better cost management, improved risk management, and a dynamic, evolving organization.

This report summarizes the work of the IT Transformation Program (ITTP) teams in Phase II: Migration and Planning. More than 65 dedicated staff have participated directly on the ITTP teams and another 20 who served as Envoys for the program. The oversight and advisory role was serviced by a Change Management Team and an ITTP Steering Committee.

During this phase, ITTP was able to:

- Further define an overall IT service delivery model, as well as develop solutions designs for major components of the new model.
- Design a high-level consolidated IT organizational structure that supports and manages the delivery of IT services in this new model.
- Propose an initial set of IT services to be implemented under the new model, including appropriate dials for service levels.
- Develop a prototype cost management process for one-time and ongoing costs associated with the IT service catalog and internal services.
- Develop implementation materials for the next phase of ITTP, including implementation plans, issues, considerations, standards, policy, governance, and more detailed organizational structures.

**IT Service Delivery Model**

The IT service delivery model that emerged from Phase II has three major characteristics:

- A "client-centric" IT organization and view of IT services.
- A defined, intuitive, managed IT service catalog.
- A new IT governance model that will align IT with campus goals and increase the value of IT services to the campus.

Consolidating IT units across campus into one services-based, client-centric organization is a radical shift that establishes a rationale for standardized IT services. The new IT organization will improve IT cost management, alignment and values, be highly focused on customer service and larger
influences beyond the customer relationship, plus recognize people in the IT community as essential resources.

**Client Relationship Management**

There are multiple ways that a client may initially contact the IT organization to request service or assistance. Regardless of how that first contact is made, the responsibility for meeting the needs of clients now rests squarely on the organization, not the client. The proposed client relationship management organization has distinct elements including self-service, Help Desk, Divisional Liaisons, and Local IT Specialists to maximize the value of these client interactions.

**IT Services, Governance and Portfolio Management**

Defined services imply a well thought out service catalog designed around what people need to get their work done. This is a shift from a technology-focus to a client focus. The IT service catalog defines what is and what is not included in “bronze” or “bronze-plus” services.

Service management will review and manage services for maximum value to the clients – portfolio management connects and maintains the alignment of the IT service catalog with campus priorities and resource management. ITTP has defined three dimensions of governance – strategic, operational, technical – to guide the IT organization and service delivery.

**Funding and Costing**

One goal of the IT service delivery model is transparency regarding the pricing of IT services. This transparency is combined with funding strategies that fill the total envelope of IT dollars and provides the basis for trade-offs and cost-benefit analyses that align the two. During Phase II, the Funding Team worked with the Workstation Support, Client Relationship Management, Web Publishing, and Server Resource Management Team to cost out IT services. Their process and tools are models for continued work in costing.

IT anticipates one-time expenses to consolidate the IT organization transform services and get to possible efficiencies. Through consolidation, IT must strive for efficiencies that can be offered back to the campus. A scalable funding model for IT is needed for services to grow in size or complexity. A challenge for funding IT remains with the unfunded gap in infrastructure services that IT continues to carry both centrally and in the divisions. This gap, along with campus initiative relying on IT require additional incremental investments

**IT Organizational Structure**

One of the outcomes of the ITTP process was the development of a first tier organization structure with six director positions. Two of these, director client relationship management and director IT services offer significant support for client interactions and a specific focus on service definition and management. The director IT strategy and planning is a dedicated resource to the alignment with campus and divisional strategies and assessment. The director program management provides explicit support for program and project management. The final two, director application solutions and director core technologies oversee the processes, tools and technologies that are critical for delivering services.

**Implementation**

The work of the ITTP teams is rich in detail that will provide the foundation for Phase III Implementation. Many of the teams looked in detail at processes, governance, standards, policies, organizational implications, tools and technologies. The work from Phase II informs how IT can approach organizational change, with a guiding document “Who We Are”.
Now that Phase II is complete, the work of planning a transition toward a full implementation of consolidated IT services has begun. Phase III: Implementation and Transition Planning Management Team will complete and implement this plan, which will include at least the following components:

- Develop a process to identify and select the managers who will report to the directors. Clarify roles and responsibilities, and provide an expanded organization chart.
- Working with the IT and Business Transformation Executive Committee, identify those individuals who will become part of the new IT organization. Develop a process that will align skills and interests of all these people with roles and positions in IT.
- Develop and obtain agreement about a funding model for the first year of operation for this new organization, as well as a sustainable funding model for future years.
- Through a series of meetings with campus units, identify IT services that must be maintained and developed by IT. Develop service agreements with these units.
- Develop an implementation sequence plan that identifies the order in which units and/or functions will be transferred.
**Background**

UC Santa Cruz continues to evolve as a world-class research university while facing extraordinary challenges, including pressure for enrollment growth during a significant downturn in state funding. Information Technology (IT) at UC Santa Cruz is a vital partner in developing creative and innovative ways to meet these challenges.

During July 2003, Information Technology leadership began reviewing options to redesign IT service delivery on campus. The purpose of the review of current IT infrastructure, funding, and service delivery systems was to plan for and coordinate all changes in alignment with the Executive Budget Committee’s (EBC) strategic goals. As a direct result, the IT Transformation Program (ITTP) was launched, consisting of three phases:

- **Phase I: Data Collection and Service Design Visioning** (July–December 2003)
- **Phase II: Migration and Planning** (January–June 2004)
- **Phase III: Implementation and Transition Planning** (July–December 2004)

<table>
<thead>
<tr>
<th>Phase I</th>
<th>Data Collection and Service Design Visioning</th>
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<td></td>
<td>• collected data across campus</td>
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<td>• developed a Service Delivery model</td>
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<td>• introduced Bronze level of service</td>
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<td>• EBC endorsed vision of new IT organization</td>
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<th>Phase II</th>
<th>Migration and Planning</th>
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<td>• developed a services-based client-focused model</td>
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<td>• created a catalog of services</td>
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<td>• tested scenarios against model</td>
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<td>• produced a guiding document for the new organization</td>
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<td>• EBC endorsed plan for new IT organization</td>
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<th>Phase III</th>
<th>Implementation and Transition Planning</th>
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<td>• establish and hire senior management</td>
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<td>• refine the services-based model and catalog of services</td>
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<td>• conduct naming and logo contest for new organization</td>
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<td>• begin implementation process</td>
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This report focuses on Phase II: Migration and Planning of the IT Transformation Program. During this six-month phase of the project, several teams and committees have worked to develop a set of services, define levels of services, and evaluate costs and people needed to implement services for the new IT organization. The planned consolidation of IT units across campus into one central organization establishes a rationale for standardized IT services. Consolidation will produce cost savings for the university; improve client services, adaptability, and responsiveness; increase flexibility; and enhance recognition of people in the IT community as essential resources.
The ITTP Teams

In Phase II, several ITTP teams and committees were created to develop project plans to address service needs, to create a client focused environment, fitting within financial constraints, and allowing for future growth and change. Following are the ITTP team/committee titles:

- IT Culture, Values, and Symbols
- Client Relationship Management
- Server Resource Management
- Security Resource Management
- Enterprise Applications, Architecture, and Standards
- IT Funding Model
- Program Management Office and Portfolio Management
- Workstation Support
- Web Publishing
- Communication
- Organization Design

In addition, the ITTP Coordinating Committee was established to provide program leadership, oversight, and integration of the work of the diverse teams and subcommittees. As well, the Change Management Team was responsible for guiding the ITTP from an overall organizational change management perspective, plus the ITTP Steering Committee gave advice, feedback and direction on high level decisions to ITTP project managers. The committees further provide a forum for investigating and resolving program issues and help to maintain a consistent vision of the new service delivery model.

Also supporting the ITTP teams are the Envoys, a team of IT staff volunteers who are directly involved on a daily basis, communicating with and soliciting feedback from campus clients and other IT staff about current ITTP progress and issues.

In Phase II, ITTP partnered with Gartner, a consulting firm, to assess campus help desk, workstation support, and server costs as well as potential savings from consolidation. UCSC's current IT costs were compared with Gartner's database considering organizations of comparable size and complexity, as a benchmark and measurement tool toward making these services more efficient. The results helped not only identify cost savings, but also better understand IT computing environment and develop implementation plans to consolidate workstations and servers. Gartner worked very closely with the ITTP teams Server Resource Management, Client Relationship Management, Workstation Support and Funding. The results from the Gartner engagement are published separately from this report.

Why Transform?

ITTP aims to create a new IT service delivery model that offers consistency and predictability in client service levels within service categories, improved accountability and efficiency, better cost management, improved risk management, and a dynamic, evolving organization.

The IT service delivery model will provide consistent and predictable client services by clarifying levels and definitions of services and providing consistent problem tracking and resolution mechanisms; client needs will be further satisfied by standardized services across campus. Consolidation of IT services will provide accountability and leadership, promoting the IT organization’s role as a crucial strategic partner in achieving campus priorities and goals while better managing costs through centralized accounting procedures and elimination of redundant services and equipment. Furthermore, consolidation will improve risk management by coordinating technical support staff’s plans for and responses to security threats. Finally, and perhaps most importantly, consolidation will improve human resource management.
The investment in people through ongoing training, professional growth, and career management opportunities will be repaid many times over by ensuring the campus a cohesive, highly skilled, motivated, dynamic group of IT professionals.

To meet the challenges imposed by the current budget crisis, IT must change both to meet immediate challenges and build a foundation for the future. To do so, however, it is essential that IT avoid traditional department cost cutting exercises. Strategic approaches to cost management must include generating near-term savings while building a more efficient and better integrated model over the long term. It is important to be inclusive and open-minded in identifying opportunities to eliminate or reduce non-essential costs and increase revenues by streamlining operations and services wherever possible while meeting service goals.
A New IT Service Delivery Model

The new IT service delivery model addresses the means by which client IT needs are identified and met. In the new IT service delivery model, services are formally identified, the client/IT relationship is prioritized, and services and service delivery are standardized across campus. The ITTP is fostering a world-class IT organization and infrastructure to support the goals of UC Santa Cruz by transforming the way in which IT services are defined and delivered across campus. This new service delivery model has three major characteristics:

- **A "client-centric" IT organization and view of IT services.** IT will build the services using a client perspective. IT staff will provide uniform expert service as set forth in the IT service catalog (Figure 5), shifting from a technologically based organization to services based one where the client is the focus.

- **A defined, intuitive, managed IT service catalog.** IT will meet the needs of faculty, staff, and students by providing a defined catalog of IT services. This catalog will provide a precise reference guide to service choices.

- **A new IT governance model will align IT with campus goals and increase the value of IT services to the campus.** IT will develop a governance process that accommodates flexibility as well as strategic alignment of IT with campus priorities.

Figure 1 illustrates these three major characteristics of the service delivery model. The IT services are represented in the middle of the diagram by the service catalog. The left-hand side of the diagram represents how clients interact with Client Services to select and use the services they require. The left and right sides of the diagram are divided by a "line of visibility." Services will be packaged in such a way that the client is presented with what is essentially a “user-friendly interface.” Other more technical details are hidden behind the line of visibility. The right side of the diagram represents the processes, IT staff, and enabling technology necessary to deliver the IT services the client selects. This approach protects the client from dealing with multiple and potentially confusing points of contact with IT.

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Figure 1: IT Service Delivery Model

Adapted from “Managing Information Technology Services”, IBM Global Services, 2001.
The major benefits of the new IT service delivery model include the following:

- **Service**: improved consistency and predictability of IT client service levels across the campus.
- **Costs**: more effective mechanisms for managing IT costs.
- **Alignment**: closer alignment of the IT functions with campus objectives to maximize the value of IT activities and investments.
- **Risk Mitigation**: improved management of IT related risks.
- **Adaptability**: a more dynamic IT organization with the flexibility to adapt quickly to changing client needs and priorities.
Client Relationship Management

Promises to Clients

The Client Relationship Management (CRM) Team identified early on in Phase II that ideally the entire organization should be clearly focused on the needs of faculty, staff, students, and community clients. To this end, they have developed seven principles designed to ensure such focus. These principles are stated as the following promises to clients:

1. You receive the campus-standard IT equipment, software, networking, and systems access required to do your work.
2. IT works diligently to ensure that your IT environment is secure, stable, reliable, recoverable, and free from intrusion and nuisance.
3. IT support, troubleshooting, and repair are available to you promptly, courteously, and in language you can understand, throughout the normal working day and during extended hours as well. In addition, you also have access to a self-service IT web portal at all times.
4. You need only contact your support specialist or the help desk to receive specific service. There is also a liaison between IT and your division for more complex or strategic questions.
5. You receive the IT related training you need to do your work.
6. One login and password provide you access to most or all IT systems and functions.
7. The baseline set of services is centrally funded and is available at no additional cost to you or your unit. Many services beyond the baseline are also available at additional cost.

Elements of Client Interactions

There are multiple ways that a client may initially contact the IT organization to request service or assistance. Regardless of how that first contact is made, the responsibility for meeting the needs of clients now rests squarely on the organization, not the client. The diagram below (Figure 2) illustrates in more detail this new IT-client interaction.

Figure 2: Client Interaction Model
The proposed CRM organization has seven distinct elements: self-service for clients, a help desk, field technicians, local IT specialists, divisional liaisons, training and documentation group, and a services assessment and overall client relationship management function.

**Self-service**

An intuitive and useful self-service Web portal, available 24 hours a day, is one of the foundations of the new consolidated model of IT services. Self-service web pages can resolve a wide range of client needs, including answering basic questions through a searchable list of frequently asked questions, providing tutorials, and eventually supporting the downloading of authorized software. The web portal will also provide current and relevant information regarding the IT transformation itself. Through these basic services, the Web portal can deflect and absorb some of the common calls to the help desk while providing a mechanism for contacting the help desk.

**Help desk**

The help desk will be staffed by a group of people who are client focused, knowledgeable about IT services and the IT organization, and trained to consistently and reliably meet customer needs. They will answer basic questions and have access to remote control software to perform some maintenance and training over the network. In addition, if help desk staff are unable to assist a client, they will be authorized to dispatch the client request to workstation support, a local IT specialist (LITS), and/or a divisional liaison, as needed. Furthermore, they will be responsible for ensuring that the client's needs are met by carefully documenting and tracking requests and problem reports.

**Workstation Support Field Technicians**

Field Technicians support the Workstation Service Managers and are a key part of client interaction without reporting to CRM. Field Technicians are the face of desktop services. These individuals go out into the field and meet with clients to solve IT problems and set up equipment.

**Local IT Specialists**

The local IT specialists (LITS) are geographically distributed throughout all areas of the campus and at off-campus locations as well. These specialists have comprehensive general IT skills, but, more importantly, they have high levels of skill specific to the academic discipline or administrative function specific to their units.

The LITS, along with the divisional liaisons, are in many ways the “face” of the IT organization. Their geographical distribution ensures that clients are personally acquainted with these representatives of the IT staff, already ideally have an ongoing support relationship with the client, and, as a practical matter, have easy access to them. To the extent possible, the IT organization aims to preserve and enhance that existing local expertise.

LITS will devote most of their time—perhaps 80%—to direct support of the clients in their region. The remaining 20% of their time will be devoted to support of clients campus-wide, to strategic projects, and to the mentoring of other IT staff.

A key task early on in the transition phase will be to charge an appropriate group, one which collectively has detailed knowledge of all campus areas, to consider the distribution of LITS necessary to better serve the campus community.

**Divisional Liaisons**

The divisional liaisons are a key strategic element of the IT organization. In general, there will be one liaison per division, whether academic or administrative, although smaller divisions (e.g.
Chancellor’s Office, Academic Human Resources, Planning and Budget) might be served by one liaison.

Divisional liaisons work closely with the principal officer of the division they serve, as well as being highly placed in the IT organization. They are strategically aligned with the division and assist with programmatic, capital, and other strategic planning. They may supervise LITS in their area.

Divisional liaisons are the governance conduits for issues that would unnecessarily clog a larger, more representative, but slower governance process. In addition, liaisons may have some discretionary budget authority, enabling them to resolve financial issues without undue delay within general policy and standards guidelines.

It is necessary to have checks and balances on the power of the central IT organization; as resources are taken from units and moved to the center, the more important this oversight becomes. There are several ways to accomplish this. Certainly, the assessment and quality assurance function within the CRM unit, discussed below, is a key factor. Service-level agreements and input into performance reviews are other methods. Another possibility is to use the mechanisms of the funding and reporting requirements of divisional liaisons.

The blue diamond specialized support represented by the blue diamond symbol in Figure 2 refers to highly specialized IT support that will remain outside of the consolidated IT organization and continue to be part of the local unit or division.

Training, Quality Assurance, and Assessment

In general, service-specific training and materials should be available online through a self-service model with training materials. Multiple training modes should be available to accommodate users’ different learning styles and preferences. Materials should be field-tested with pilot groups before implementation of any new service. Most essentially, materials will be written in non-technical language.

To help ensure a client focus, CRM might continually assess the quality of the IT organization’s services. The Quality Assurance and Assessment group will consist of two parts: (1) the CRM and request-tracking system; and (2) the client needs and satisfaction assessment group.

The head of this unit, the director of client relationship management and services assessment, will be an “empowered advocate,” acting on behalf of both organizational units and clients to ensure IT services are delivered as needed, and participating in strategic planning and monitoring projects to ensure delivery of benefits. All these roles are more fully described in the Resources section of this report: “Final Report of the Client Relationship Management Team.”

Request Tracking System

This unit is the organizational home of the client relationship management/request tracking system. Data collected through this system, including time-to-resolution, platform and software analysis, escalation paths, FAQ analysis, and direct online feedback from clients, among other means—will provide metrics to help the organization assess its resource deployment, staffing levels, and general effectiveness overall.
Client Interaction Scenarios

As a technique for designing and refining the client interaction model, the teams made use of Client Interaction Scenarios to animate and test their thinking about how the model would work in practice. For more details and scenarios please visit:
http://its.ucsc.edu/transformation/scenarios.php

Scenario 1: Externally-mandated upgrade in the Library

A new mandatory statewide library program has been developed through the California Digital Library, which requires the installation of software on 10 computers in the Science & Engineering Library. All of the computers meet the campus standard OS for Macintosh computers, but the software requires a slightly later version of the OS. Additionally, these computers will need 512 MB of memory, and they are currently running 128 MB.

The library coordinator for the project contacts the library's divisional liaison to discuss the request. The divisional liaison can make independent decisions regarding to the campus standard, up to $6,000. Seeing that the program is a statewide mandate and that the cost for upgrading these 10 computers with software and hardware is less than $6,000, the divisional liaison authorizes the expense to IT. The divisional liaison creates a trouble ticket in the CRM system, delegates the task to the library LITS, and communicates with her fellow divisional liaison colleagues and her supervisor to inform them of her decision. At the next monthly meeting of the divisional liaisons, this decision and others that exceed the campus standard are discussed, and if necessary, the campus standard is adjusted. The library is informed of the decision completed process. Future requests for upgrades to software and hardware handled accordingly.

The LITS contacts the 10 clients to arrange for a convenient time for the upgrading of their computers. The LITS also enlists the assistance of the hardware and software depot to obtain the correct materials for the job. When the project is finished, the LITS closes out the trouble ticket in the CRM system.

In an alternate scenario, the workstation support could be utilized instead of the LITS since the job is relatively straightforward. That should be up to the divisional liaison or the LITS, who understands the complexity of the computers being upgraded.

Figure 3: Library Scenario
In an alternate scenario, the workstation support could be utilized instead of the LITS since the job is relatively straightforward. That should be up to the divisional liaison or the LITS, who understands the complexity of the computers being upgraded.
Scenario 2: Request for new workstation and training

Reorganization within a department results in an assistant manager being promoted to manager, who hires a replacement to oversee a large graduate program. The newly hired graduate advisor must receive an appropriate workstation and the training to use all required enterprise programs, especially the new graduate admissions program. The new manager was promoted before using the new admissions program herself, so she cannot offer the usual in-house training. Who does she contact to setup the training? The recruitment season is already underway by the time the new hire is on board.

The department manager had discussed the upcoming needs with the divisional liaison at the time that the department was originally discussing the administrative reorganization. The divisional liaison therefore has had adequate time to assess the availability of appropriate hardware, the software required, and the associated costs, if any. The divisional liaison advises the department manager about what service packages to request. By the time the final hiring decision is being made, the department manager contacts administrative help to request a new workstation and emphasizes the need for training specific to the graduate admissions system. The department manager will identify the service package (hardware, software, support) from the IT service catalog provided by the help desk.

The help desk generates a trouble ticket and enables access to accounts ordered by the department manager: email, AIS, Embark, and FIS. Various accounts will be available to the new hire at the start of employment or as training is completed. The help desk also contacts workstation support, who will contact the department manager to confirm where the new workstation will be located and when it is needed, determine that the appropriate voice and data ports exist or makes arrangements to have them installed, have phone service installed and activated, and arrange training. The new employee may be directed to online tutorials, scheduled for ongoing group classes, or scheduled for one-on-one training as needed.

The tracking system will notify the department manager by email that requests are being processed, and the manager or new employee may check the status of requests online. The divisional liaison will monitor the progress of requests and will ask the administrative LITS to check that the workstation and necessary support have been provided and that the new employee and department manager are satisfied with all systems.

Figure 4: New Employee Scenario
IT Services

What is an IT Service?

A service is...

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

IT Service Principles

A well thought out, client-centered service portfolio is critical to the success of the new consolidated IT organization. These services should be designed around what people need to get their work done and are presented in a formal IT service catalog.

These broad service suites will help the organization move from an “IT as product” paradigm to an “IT as service” paradigm. People require a technology-enabled workspace, including a workstation that will be maintained and upgraded on a standard replacement cycle, a functional network connection, a telephone, voicemail, software, software renewal and licensing management, printing, etc.

One rule of a client-centered design is if there is only one option; don’t ask the client to make a choice. Since a client should not have a computer without the network connection to attach it to the rest of campus or without the software required by the client, the burden of acquiring all these components should not be on the client.

This type of model supports and empowers the campus’ business. People only need to make one contact to provide all the technology and services they need for a new employee. Additionally, it prevents problems caused by, for example, some units choosing not to get some employee’s voicemail because it is “too expensive”—in other words, deemed not a high enough priority for the unit. While this strategy saves the local unit a little bit of money in the short run, it costs far more in time, inefficiency, and lost opportunity in the long run. The way to avoid this type of problem is to stop externalizing these core business costs onto local units and instead incorporate them into centrally funded comprehensive service suites.

Bronze Level of Service

Today, campus IT consumers receive a variety of baseline services along with what can be described as premium levels of service. But while high-end IT services can be found in many places, they are not broadly available to the campus community as a whole. The ITTP will optimize services by offering a new level of IT service that is widely available to all IT consumers on campus—the bronze level of service.

The term "bronze" was chosen to describe an IT service level that will ensure a strong base of support. It promises a high-quality, consistent IT support level, provided centrally without recharge, so that members of the campus community can efficiently get work done. At the same time, it provides tremendous flexibility as client needs change or funding ebbs and flows.

There are three possible categories of IT services. Bronze services are provided by IT at no cost to the campus community. These bronze services are contracted according to service level agreements for a particular client segment. They should provide IT services so people can do their work.

“Bronze plus” services are IT services provided to those who pay for them. This category encompasses more specialized services but is intended to capture economies of scale associated with centralizing these types of services.
Highly specialized services are not performed by IT. Examples include the cluster support for the School of Engineering’s human genome project, telescope programming or support, and other blue diamond services. These services are so highly specialized that there is little or no advantage associated with centralizing them. Therefore, both the costs for and the performance of these services should remain with the local units or divisions.

**IT Service Catalog**

The IT service catalog will list and describe all the IT client services, including the bronze and bronze-plus services described above.

![IT Service Catalog](image)

**Figure 5: IT Service Catalog**

While the service catalog will eventually list all of the IT client services, the following excerpt (Table 1) is the set of services that ITTP proposes as the first priority set for transformation. They are the support services that are important to an IT client focused model and further cover areas that have been lacking: web development/publishing services, project management services, and application development for departmental applications.

The IT service catalog describes services that are visible to the clients as end users. There is another set of services required to deliver these client services. These internal services are behind the line of visibility and include servers and security, project management, portfolio management training, quality assurance, and other IT infrastructure projects. One way to think of this is that the clients of these services are within the IT organization itself.

There are existing IT services which ITTP did not categorize as either client services or internal services. These services currently provided by Network and Telecommunications, enterprise applications (LASSO), Instructional Computing, and Media Services will be transformed into either client or internal services in order to complete the IT service catalog.
### Getting Help and Support

<table>
<thead>
<tr>
<th>Service Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help desk services</td>
<td>We offer phone, email, or web access to technical support specialists.</td>
</tr>
<tr>
<td>Self-service support</td>
<td>We offer self-service help via the web. This includes access to our knowledge bases as well as the ability to request services and track those requests.</td>
</tr>
<tr>
<td>IT training</td>
<td>We provide IT training to our clients so they can maximize their resources.</td>
</tr>
<tr>
<td>Hardware subscription program: hardware and support</td>
<td>We offer a complete desktop package including hardware support, software support, and technical support services.</td>
</tr>
<tr>
<td>Software subscription program</td>
<td>We offer a software package containing the productivity software common across the campus.</td>
</tr>
<tr>
<td>Software packages</td>
<td>We offer add-on software packages to our productivity software package. These add-ons are choices that clients can pick towards a software suite that supports their individual needs.</td>
</tr>
<tr>
<td>Desktop support: support-only for non-subscription systems</td>
<td>We offer stand-alone technical support services for systems outside our hardware subscription services.</td>
</tr>
<tr>
<td>Desktop support: relocation and migration</td>
<td>We will plan and execute a relocation or migration strategy for your desktop systems.</td>
</tr>
<tr>
<td>Peripheral packages</td>
<td>We will support the add-on of any of our supported peripherals along with your desktop subscription packages.</td>
</tr>
</tbody>
</table>

### Solutions Using IT

<table>
<thead>
<tr>
<th>Service Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Divisional IT opportunities and process improvements</td>
<td>We facilitate the working relationship between IT and divisions. We look for IT opportunities within the division and ways to use technology towards improving divisional processes. We want maximum IT value and client satisfaction.</td>
</tr>
<tr>
<td>Application development services (departmental)</td>
<td>We offer the resources to develop departmental (definition) applications. We assign project managers and develop the application from technical requirements to deployment.</td>
</tr>
<tr>
<td>Application development services (web)</td>
<td>We offer the resources to develop web or presentation layer (definition) applications. We assign project managers and develop the application from technical requirements to deployment.</td>
</tr>
<tr>
<td>Web site or graphics design</td>
<td>We apply content management and graphics expertise to the design of your website or individual graphics.</td>
</tr>
</tbody>
</table>

### Building Blocks

<table>
<thead>
<tr>
<th>Service Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program and project management</td>
<td>We offer resources to IT programs or projects from startup to conclusion. We use standard methodology and tools and ensure project management quality and consistency across our projects.</td>
</tr>
<tr>
<td>Project management coaching</td>
<td>We coach, mentor, and train on project management for project managers, clients, and project teams. We offer classes, workshops, and awareness sessions.</td>
</tr>
<tr>
<td>IT portfolio management</td>
<td>We review our portfolio of services in order to maximize the value to the client and campus. We analyze client and divisional requirements along with technology enhancements, in partnership with campus advisory groups. Our priorities are brought to the campus leadership for discussion with endorsement based on desired service levels and funding.</td>
</tr>
</tbody>
</table>
**Service Definitions**

IT service management will oversee and coordinate the delivery of the IT service catalog to clients, including the following:

- Service design and packaging.
- Service implementation and education.
- Service delivery according to defined service levels.
- Service maintenance and evolution.
- Service decommissioning.

The service management will also work closely with IT leadership and the appropriate IT governance bodies to ensure that the right set of services are provided to clients. This collaboration will also result in changes in the set of services in terms of additions, upgrades, or adjustment in service levels.
Governance and Portfolio Management

IT governance defines the processes, decision rights, and accountability at various levels of the institution to manage the IT function. Governance needs to address four key questions about IT:

- Are we doing the right things?
- Are we doing them the right way?
- Are we getting them done well?
- Are we getting the benefits?

With the emphasis on services in the IT service delivery model, the services management process is concerned with reviewing the service catalog or standards and architectures with input from individual clients, from both campus/divisional technological points of view. A campus advisory structure feeds into this operational and technical governance mechanism.

Portfolio management connects the IT service catalog to campus priorities and overall resource management. Portfolio management, the responsibility of the director of IT strategy and planning, integrates with strategic governance and focuses on alignment/congruence with campus direction, established annual priorities, ad-hoc priorities and resources, and implications for resource allocations.

![Figure 6: IT Governance Model](image)

ITTP has defined three dimensions (strategic, operational, and technical) of governance that will guide the new IT organization and its service delivery. Appropriate decision rights and accountability will be assigned across these three dimensions of the governance structure to delegate and expedite sound decision making. The intent is not to create a cumbersome process but an accountable one that will be responsive and dynamic. The goal is to present options and priorities with the assurance that a well researched, collaborative process has taken place first.

At the operational and technical level, IT will strive for flexibility. At a strategic level, options and priorities will go to the vice provost of IT and the Information Technology Council (ITC), acting as an
advisory structure. These options and priorities will then become recommendations to the chancellor and provost/executive vice chancellor for final decisions on funding and resource allocations.
Funding and Costing

Funding for IT services will be directly linked to governance processes and efforts to align the IT organization and its service portfolio to campus priorities and needs. One goal of the IT service delivery model is transparency regarding the pricing of IT services. Standard costing data will facilitate trade-off and cost-benefit analyses required for the campus, at the strategic governance level, to make funding choices. Appropriate costing of these services will also result in potential savings to be obtained via the implementation of standards or other efficiencies.

The budgetary picture of IT service delivery is a combination of a funding strategy and this new transparency. The following diagram (Figure 7) summarizes these approaches.

**Figure 7: Funding IT Services**

On the left (A) is the total envelope of IT dollars. Multiple funding strategies fill the envelope with core funding, auxiliary funding, fees for service, or other sources. On the right (B–E) are the IT services that must fit into the envelope. Several types of IT services comprise the total picture of costs (Table 2).

<table>
<thead>
<tr>
<th>Services</th>
<th>Description</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>(B) Client services</td>
<td>Formally engineered services in the IT service catalog.</td>
<td>• Help desk, workstation support, divisional liaisons, and LITS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Departmental application development and web publishing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Project management</td>
</tr>
<tr>
<td>(C) Internal services</td>
<td>Foundational services that are required to deliver the client services in the IT services catalog.</td>
<td>• Servers and security</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Project management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Portfolio management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Training, quality assurance.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• IT infrastructure projects</td>
</tr>
<tr>
<td>Services</td>
<td>Description</td>
<td>Examples</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| (D) Other existing   | Those services not yet defined for the services catalog that will continue   | • Instructional Computing  
| services              | as-is through an initial period of transformation. They will be redefined in the    | • Media Services  
|                       | services based model eventually with all elements either being transitioned to client or    | • Enterprise applications  
|                       | internal services.                                                           | • Network and Telecommunications Services                                                               |
| (E) Initiatives       | Projects driven by campus needs or process improvements, for which costs have been identified but not funded. | • EBC initiatives: time and attendance, recruitment management system, e-procurement  
|                       |                                                                             | • Campus process improvements: e.g. graduate admissions review process (GARP), Adobe workflow solutions |

Table 2 – IT Service Types

Costing IT Services

During Phase II, the Funding Team explored the mechanisms to cost out IT services. For each of the services in the IT service catalog, the Funding Team worked with team leaders to break down the services as follows:

![Figure 8: Costing IT Services](image)

The team leads focused on defining the key elements of their services and what resources would be required to deliver those services. Resources were broken down into two categories, the roles, and the tools and technologies required for the provision of those services. ITTP teams defined the roles in terms of the number and level of staff needed in the new, services-based organization. These personnel expenses were costed using average salary data collected in the last fall's ITTP Phase I data collection effort. The tools and technologies expenses were costed in terms of what systems would be implemented in the new service delivery model.

Team leads and funding model team members also defined and costed different service levels for the transformed services. The definition of service attributes allowed for the development of variable service levels and costs. For example, the number of hours and the level of staffing at a help desk are key attributes of that service that directly inform service level and the related costs. The development of different service level scenarios provides the campus with the ability to "dial" service
levels and costs up or down depending on priority and overall budgetary climate.

Additionally, team leads identified the internal services (including server resources, security and information architecture standards and others) needed by their focus areas. The delineation of internal dependencies informed the Phase II work on servers and security and will serve as a critical foundation for the future costing of other IT services (both external and internal).

Future work on costing will expand to include focus on IT services that have yet to be transformed, including a focus on those existing services. Additionally, the critical links between externally oriented services and internal services will be thoroughly examined.

**Cost Management**

It is quite plausible that the desired costs for IT services could exceed the available funding. Conversely, in good times, the size of the IT funding envelope could increase (Figure 9).

![Figure 9: Fitting Costs into the IT Funding Envelope](image)

Fitting the costs into the funding envelope requires decisions about priorities and tradeoffs in costing. Table 3 describes some of the cost management tools and the trade-offs against dollars:
The Challenge of Funding IT

Effective cost management requires accounting for all costs of maintaining IT across the campus, both one-time and ongoing. IT anticipates one-time expenses to consolidate the IT organization, transform services, and get to possible efficiencies.

A challenge for funding IT remains with the unfunded gap in infrastructure services that still exists. This is likely to widen as IT absorbs similar gaps from the divisions while aiming to achieve bronze level services that adequately manage risk, represent IT alignment, and incorporate adaptability.

Through consolidation, IT must strive for efficiencies that can be offered back to the campus. With or without these efficiencies, however, a scalable funding model for IT is needed as well as setting a target for the future, including additional investments, in order to close the total gap. (Figure 10)
An IT organization that adopts a services-based model must reinforce the client focus in its reporting structure. One of the outcomes of the ITTP process was the development of a first tier organization structure reporting to the Vice Provost, Information Technology Services, together with proposed functional areas associated with the respective directors. The first tier includes:

- Director IT Strategy and Planning.
- Director Client Relationship Management.
- Director IT Services.
- Director Application Solutions.
- Director Core Technologies.
- Director Program Management Office.

Other elements such as security, training, communications, and policy are embedded in this first tier organization structure.

The major responsibilities of each key director/function are reflected in the job postings in the appendices. Key areas that differ from IT’s existing organizational structure, either centrally or distributed, are the following:

- Significant support for client interactions under the director of client relationship management.
- Specific focus on service definition and management under the director of IT services.
- Dedicated resources to the alignment of IT with campus and divisional strategies under a director of IT strategy and planning.
Explicit support for program and project management under a director of program management office.

Organizational Change

IT consolidation represents a huge organizational change to bring together dozens of different people from separate organizations into one cohesive team. ITTP is considering how to manage the transition of people from across the campus whose scope of work and reporting relationships will change, including those in the existing IT organization. IT will need to develop a fair and rational process that will align individual skills and interests with new and changed positions.

In addition to this logistical challenge, IT will face a cultural shift in terms of fostering the strong client-centric model that ITTP envisions for the campus. Training, including leadership training, will be essential for people at all levels in the new organization. In addition to any campus-level training that may emerge, ITTP plans to consider initial and ongoing training targeted to help people acquire new skills, take on new roles, instill a client focus, and improve the way IT provides service to the campus community.

Cultural/Behavior Changes Required

The move to the new IT organization will also require a key shift in prevailing IT culture and behavior. To this end, the IT Culture, Values and Symbols Team of ITTP consulted widely within the IT community and created a “Who We Are Guiding Document” (Figure 12). This document expresses the principles, values, and behaviors that will guide and inspire the new campus-wide IT organization to meet the needs of clients, the campus, and IT employees.

The "Who We Are Guiding Document" (Figure 12) connects the work of the IT community to the success of UC Santa Cruz as an institution of educational and research excellence. It gives guidance for developing a new IT organization that is effective in providing relevant IT services focused on the needs of their clients. It voices the ideas of IT employees about how they can work together successfully as one campus-wide IT organization.

Empowering the Organization

ITTP proposes six internal services to meet the needs of IT employees and the IT organization. These internal services are tangible ways to make the vision of the “Who We Are Guiding Document” become real in daily working lives. The six services are ranked in order of the most important to implement first:

1. Fostering a sense of IT community.
2. Communications.
3. Training on working effectively.
4. Technical training.
5. Feedback program for IT community.
6. IT human resources projects.
**who we are**

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

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.
* trust each other with mutual respect and dignity.
* demonstrate courage, insight, and adaptability and thrive in a challenging environment.
* have confidence in 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 acuring accountability. We keep our promises.
* communicates effectively within the division and beyond.
* flows as one interconnected unit, continually enhancing knowledge and services in response to the campus community.
* respects diversity in the quest for knowledge.

Figure 12: Who We Are Guiding Document
Implementation Approach

Implementation of IT transformation will involve service changes, a managed effect on clients, and organizational change. The next phase (Phase III: Implementation and Transition Planning) of ITTP is expected to entail more detailed implementation planning involving these same crucial factors, led by the senior management group of the new IT organization. Implementation planning will involve the maintenance of existing services as IT builds and transitions to these centrally provided client services.

Principles

ITTP has developed the following principles for implementation:

- IT must maintain services from the perspective of the client.
- IT will transition to new services after they are well defined and functional.
- IT will evaluate internal services along with client services during implementation.
- IT must preserve employment and find roles and jobs that fit people’s professional skills.
- IT will invest in training as a key enabler.
- IT will evolve as quickly as the organization allows with a safe transition.

ITTP Team Implementation Planning

The implementation period for these initial client and internal services ranges from as little as one year to as many as six. The implementation period represents both the one-time investments required as well as the time until efficiencies are realized. ITTP expects to begin moving all IT services to the services-based model within the first two years of consolidation.

The work of all the ITTP teams will greatly inform the next phase of ITTP, implementation and transition planning. Larry Merkley served as an advisor on most of the teams. What follows are the team members and their implementation plan summaries.

IT Culture, Values, and Symbols

Project Team Members: Coleen Douglas, Bruce Horn, Henry Burnett, Lisa Bono, Vicki Davis

The implementation approach developed by the IT Culture, Values and Symbols Team is summarized below in the sections entitled "Cultural/Behavior Changes Required" and "Empowering the Organization" in this report. For more details, see the Appendices section in this report.

Client Relationship Management

Project Team Members: Beth Guislin, Scotty Brookie, Catherine Soehner, Jackie Davis, Lynda Potzus, Magge McCue, Naomi Gunther, Ramon Berger, Terry Schalk, Warren Mikawa, Phillip Stark, Susan Willats (Advisor)

To read the full Client Relationship Management report, please visit: https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPClientRelationshipManagement "CRM Final Report” Note the Implementation Plan section of the report.

Server Resource Management

Project Team Members: Brad Smith, Lindsay Bass, Bob Vitale, John Hammond, Ken Garges, Gary Moro, Steve Hauskins, Ed Boring

The approach recommended by the Server Resource Management team includes formalizing data center operational practices, establishing data center facilities standards and making the necessary
changes to implement these standards, and initiating the on-going process of consolidating UC Santa Cruz server resources. Server consolidation addresses the problem resulting from two characteristics of server deployment in organizations.

The ITTP Server Team proposed the following strategy for server consolidation:

- Develop a detailed inventory of existing servers.
- Identify consolidation opportunities, keeping an eye out for opportunities for standardization (in the sense of eliminating irrational diversity), simplification, and storage consolidation.
- Identify needed transitional or temporary server and network capacity.
- Plan for staffing changes.
- Develop or update the disaster recovery plan.
- Develop or update the cost recovery and billing models.
- Prioritize and implement.

For more details, see the Appendices section in this report.

**Security Resource Management**

**Project Team Members:** Brad Smith, Davi Ottenheimer, Ethan Miller, Paul Tatarsky, Steve Zenone

For detailed information about the Security Resource Management implementation plan, please visit: [https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPSecurityTeam](https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPSecurityTeam)

**Enterprise Applications, Architecture, and Standards**

**Project Team Members:** Eric Goodman, Diane Koletzke, Jeanne Whitney, Phil Waugh, Donna Riggs, Deb Turner

The Enterprise Applications, Architecture and Standards group recommends creation of two separate groups in the IT Organization to implement applications and systems support. The Application Solutions group will focus on development and configuration of applications in support of University business needs. The Core Technologies group will focus on providing operational support of the technical elements such as hardware, operating systems and databases. Formal change management processes should be developed for the transition of applications from development to production to provide as stable an operational environment as possible.

In addition, the IT organization should seek to provide economies of scale by developing common processes, standards and functions to be shared across units and by grouping individuals with like skill sets into pools where this would provide flexibility in assigning resources to processes.

Specific activities to undertake in support of these goals include:

- Restructure governance bodies along functional rather than application-based lines (e.g., financial and HR steering rather than FIS and PPS steering). See EAAS Functional Govert Examples.doc at: [https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPEnterpriseAppsArchitectureStandards](https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPEnterpriseAppsArchitectureStandards)
- Appoint leaders of new Technical and Data Architecture councils. These councils will coordinate the use of common processes and standards across units and systems. See EAAS Architecture Governance at: [https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPEnterpriseAppsArchitectureStandards](https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPEnterpriseAppsArchitectureStandards)
- Create departments based on commonly required skill-sets where appropriate (e.g., System Administrators, Oracle DBAs, Java programmers) to provide support efficiencies.
- Create a new, centrally funded group to provide application development and management expertise in support of business needs not currently supported by IT (e.g., departmental database applications). [This group would begin with an audit of existing non-central...
applications, and would work with the technical and data architecture councils to consolidate support and ongoing development of these applications.] See the three documents in the "Departmental Application" section at: 
https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPEnterpriseAppsArchitectureStandards

- Initiate a review process of support structures for major central systems (e.g., FIS, AIS, PPS, Data Warehouse) to determine how to best integrate that support into the organizational structures defined above.

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**IT Funding Model**

**Project Team Members:** Magge McCue, Lara Mellegers, Marina Ulmishek

Much of the IT Funding Model work is reflected in the Costing of IT Services on page 16 of this report. The work of the campus-wide Funding Model Team will continue and IT will participate in the ongoing work.

The costing work undertaken by ITTP Team Leads and the Funding Model Team has created a framework that can be used for the costing of all other IT services, including both internal and external services. As the ITTP continues and the next set of services defined, the costing framework will be utilized.

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**Program Management Office and Portfolio Management**

**Project Team Members:** Mark Cianca, Mel Barracliffe, Linda Kittle, Linda Rhoads

It is recommended that a phased approach will be used to implement the Program Management Office (PMO) function. The immediate action should be the appointment of the Director of the Program Management Office. The initial focus of the PMO should be on identifying and building internal IT capability and competency around program and project management using a set of pilot projects. During this phase the Director will work with IT leadership to identify initial IT PM needs and gaps. The initial PMO staff will be selected to run the pilots and begin to define the PMO. The pilot projects will allow the PMO team to develop a better understanding of any training gaps, approached to coaching and mentoring, and to develop a broader implementation plan.

Using the pilots as a proving ground the PMO team will begin to develop solutions to immediate concerns and issues surfaced by various stakeholders. Suggested activities would be:

- Building an inventory of current and pending IT projects.
- Deployment of a project management methodology.
- Developing summary reports and metrics for management reporting.
- Holding project reviews & informal training sessions with project managers.
- Providing coaching support of pilot projects.
- Project planning and/or project control workshops.
- Creation of templates and identification of leading practices for use by Project Managers.

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**Workstation Support**

**Project Team Members:** Aaron Melgares, Chris Kamalani, Gary Moro, Jay Olson, Shawn Duncan, Tammy Heinsohn, Eric Mitchell

There are five main components of the workstation support implementation plan: workstation support services, the hardware depot, the software depot, the quality assurance lab, and support staffing.
Several services such as a standard desktop subscription program, and a general computer support package will be offered in the new IT organization. Implementing workstation support services will require common hardware and software standards to be developed, detailed service level agreements to be written for each service, and several remote management systems to be deployed.

The quality assurance lab along with the hardware and software depots are centralized resources for the testing, purchase, configuration, and deployment of computing equipment and applications. They will require several implementation projects including identifying space, stockroom setup, repair center setup, acquisition of delivery vehicles, and staffing. Several internal systems such as license servers and patch management systems will need to be deployed.

Workstation support staffing must bridge the gap between existing computer support and a more standardized, managed computing environment. Field technicians and computer coordinators will jointly provide hardware and operating system support as client computers move from the existing state to a support model based on the service level agreements of various workstation support services.

Web Publishing

**Project Team Members:** Robin Ove, Chris Kamalani, Jim Burns, Matthew Kalastro, Bryn Kanar, Beth Guislin, Christina Navarro (Customer Voice Advisor)

The ultimate size and scope of a centralized web publishing office may hinge on the resources available for its establishment and the outcome of other components of the IT transformation. But the need for such an office—even at a starter level—is not in doubt. In fact, we concluded that the establishment of a centralized IT-based web publishing office, if coupled with an investment in web development in UC Santa Cruz Public Affairs unit, would significantly advance UC Santa Cruz overall web presence. Investment in these two areas would create an environment in which standards could be more easily implemented and content more easily owned, managed, and published. These gains would make UC Santa Cruz current web presence more dynamic, while at the same time preparing the campus for development and maintenance of content within a personalization-based portal.

Our solution design would create an IT web publishing office. In this transformation scenario, we are also proposing that additional web positions become part of the Public Affairs unit. The configuration of this web publishing enterprise is based on two assumptions: that the IT transformation will result in UC Santa Cruz current web developers becoming part of a large central organization, and that their current responsibilities will be transferred to this new organization. This solution design was based on our internal assessment of UC Santa Cruz rapidly increasing web development and maintenance needs—and is a reflection of the people we believe it would take in a central organization to perform those tasks thoroughly. It should be noted that we found no comparable educational institution utilizing a centralized web unit of this scale because we found no institution "transforming" its IT activities on this scale. But there are many institutions—including many in higher education—in which a core web group exists in the organization's center.

We should note that the members of our committee did not attempt to "solve" the campus's many web challenges. We did, however, identify and prioritize a number of high-level projects. The governance and organizational models that we are proposing will, we believe, prove to be capable of addressing these challenges.

Detailed implementation plan is available at: [https://supremo.ucsc.edu/twiki/pub/ITTP/WPTWorkDocs/ITT5-implementation.v2.doc](https://supremo.ucsc.edu/twiki/pub/ITTP/WPTWorkDocs/ITT5-implementation.v2.doc)
**Communication**

**Project Team Members:** Mark Cianca, Lisa Bono, Mel Barracliffe, Coleen Douglas, Michelle Erickson, Janine Roeth, Bonita Sebastian, Dan Snodgrass, Warren Mikawa (Envoy Program)

This team was created to assist Lisa Bono with IT Transformation Communications. Therefore, no implementation plan was developed. The Communication Team is expected to continue through Phase III.
Conclusion

ITTP Phase II: Migration and Planning was complete at the end of June 2004. During this phase, the program accomplished the following:

- Further define an overall IT service delivery model, as well as develop solutions designs for major components of the new model.
- Design a high-level consolidated IT organizational structure that supports and manages the delivery of IT services in this new model.
- Propose an initial set of IT services to be implemented under the new model, including appropriate dials for service levels.
- Develop a prototype cost management process for one-time and ongoing costs associated with the IT service catalog and internal services.
- Develop implementation materials for the next phase of ITTP, including implementation plans, issues, considerations, standards, policy, governance, and more detailed organizational structures.

The activities of ITTP Phase II were reported to the Executive Budget Committee (EBC) multiple times, culminating in their quarterly meeting on June 24, 2004. At that meeting, the EBC endorsed the general scope and direction of the IT service delivery model. Furthermore, they endorsed the role of the Executive Transformation Committee as a resource for ongoing policy decisions around the organization and establishing first year and ongoing funding envelopes. The ITTP Steering Committee will continue to serve as a working committee to support this more strategic one.

Figure 13: Phase III: Implementation and Transition Planning
Next Steps

Now that Phase II is complete, the work of planning a transition toward a full implementation of consolidated IT services has begun. Phase III: Implementation and Transition Planning Management Team will complete and implement this plan, which will include at least the following components:

- Develop a process to identify and select the managers who will report to the directors. Clarify roles and responsibilities, and provide an expanded organization chart.
- Working with the IT and Business Transformation Executive Committee, identify those individuals who will become part of the new IT organization. Develop a process that will align skills and interests of all these people with roles and positions in IT.
- Develop and obtain agreement about a funding model for the first year of operation for this new organization, as well as a sustainable funding model for future years.
- Through a series of meetings with campus units, identify IT services that must be maintained and developed by IT. Develop service agreements with these units.
- Develop an implementation sequence plan that identifies the order in which units and/or functions will be transferred.

WHO WE ARE: Guiding Document for the New IT Organization

During the past four months of Phase II - Migration and Planning, the IT Culture, Values and Symbols Team has worked to provide clarity on this overarching question for the Information Technology Transformation Program:

Which principles, values, and behaviors will guide and inspire us, as one campus IT organization, to meet the needs of our customers, our campus, and our IT employees?

In our quest for knowledge, we completed reading and research, analyzed data from the four IT Cafés held in 2003, consulted widely within the campus IT community, held an IT Café focused on culture and values, worked with the ITTP Team Leaders, interviewed senior campus administrators, and conferred with IT Vice Provost Larry Merkley. Our primary strategy was to bring together the intelligence and ideas of the people in the IT community to help us answer our overarching question. Our goal was to provide a one-page guiding document that informs the process we are going through to create a successful new IT organization at UC Santa Cruz.

The guiding document---WHO WE ARE (see Figure 12) expresses the principles, values and behaviors we believe will move us into a new culture that supports a client-focused services-based campus-wide IT organization, and meets the needs of IT employees.

WHO WE ARE describes our purpose, values, and aspirations for the future. It connects the work of the IT community to the success of UC Santa Cruz as an institution of educational and research excellence. It gives guidance for developing a new IT organization that is effective in providing relevant IT services focused on the needs of our clients. It voices the ideas of IT employees about how we can work together successfully in one campus-wide IT organization.

This document is a product of our team’s work, and will develop over time to become the official guiding document for the new IT organization. Over the next few months, this guiding document will be used in a number of ways. For example, in July it will be used in the process of choosing a name for the new IT organization. As the IT Transformation process continues, we’ll surely discover changes that need to be made, and will modify the document appropriately. Just like the new IT organization, this document will be adaptable as we learn how to work with it over time.

Thank you to the many people who contributed their time and ideas in making this guiding document a reality.

See this URL for a more complete description of the work of the IT Culture, Values and Symbols Team:  http://its.ucsc.edu/transformation/who_we_are.php

EMPOWERING THE ORGANIZATION: Recommendations for Phase III, Implementation

The IT Culture Values and Symbols Team propose six internal services to meet the needs of our IT employees and the IT organization. These internal services are tangible ways to make the vision of the Who We Are document become real in our daily working lives. The six services are ranked in order of the most important to implement first:

1. Fostering a Sense of IT Community
2. Communications  
3. Training on Working Effectively  
4. Technical Training  
5. Feedback Program for IT Community  
6. IT Human Resources projects

Each service is comprised of a number of elements, or fundamental functions. The elements comprising each service are ranked in order of the most important to implement first:

**FOSTERING A SENSE OF IT COMMUNITY**
1. Orientation program  
2. IT Envoys  
3. Formal networking  
4. Informal networking and peer support  
5. Recognition and awards program  
6. Mentoring program for the IT community

**COMMUNICATIONS**
1. Getting information from the center out  
2. Emergency information  
3. Getting information from the staff into the center  
4. IT website  
5. Peer to peer information

**TRAINING ON WORKING EFFECTIVELY**
1. Management training  
2. Working together effectively  
3. Define “soft skills and competencies” needed for organizational success  
4. Project management training  
5. Leadership, at all levels  
6. Customer service

**TECHNICAL TRAINING**
1. Define technical skills and competencies needed for organizational success  
2. Assessment of current technical skill levels  
3. All levels of technical training  
4. Internal collaboration, colloquium, sharing knowledge  
5. Just in time, when and where I need it, technical training

**FEEDBACK PROGRAM FOR IT COMMUNITY**
1. Regular feedback from IT staff  
2. Methods to incorporate feedback into adaptable IT organization  
3. Measurable goals and objectives, based on Who We Are  
4. Annual report of progress

**IT HUMAN RESOURCES PROJECTS**
1. Address pay and workload equity issues  
2. Clear promotion and rewards policy and procedure  
3. Offer clearly identified and varied career paths

It’s clear that all of these recommended services cannot be implemented at once. Although there are a number of recommendations that can proceed with volunteer time commitments, many require funding.

They require an investment in staff responsible for carrying out the services, and an investment in training programs, communications, and IT community events. There will be a phased
implementation, likely involving a number of these proposed services. Our ranking, by most important aspects to implement first, will help to guide the implementation process.

See this URL for a more complete description of the work of the IT Culture, Values and Symbols Team:  http://its.ucsc.edu/transformation/who_we_are.php

See this URL for a more complete description of the IT Culture, Values and Symbols Team recommended services, and other Team documents:  https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITPCultureValueSymbols

Client Relationship Management

Project Team Members: Beth Guislin, Scotty Brookie, Catherine Soehner, Jackie Davis, Lynda

To read the full Client Relationship Management report, please visit:  https://supremo.ucsc.edu/twiki/pub/ITTP/ITTPClientRelationshipManagement/crm_final_report.pdf

For in depth ITTP team information, please visit:  https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPClientRelationshipManagement

Server Resource Management

Project Team Members: Brad Smith, Lindsay Bass, Bob Vitale, John Hammond, Ken Garges, Gary Moro, Steve Hauskins, Ed Boring

For in depth ITTP team information, please visit:  https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPServerResourceManagement

The approach recommended by the Server Resource Management team includes formalizing data center operational practices, establishing data center facilities standards and making the necessary changes to implement these standards, and initiating the on-going process of consolidating UC Santa Cruz server resources.

Server consolidation addresses the problem resulting from two characteristics of server deployment in organizations. First, there is a tendency for the number of servers in an organization to grow at a surprising rate due to the fact that modern computing systems tend to implement one application, one server paradigm. This tendency is magnified by the common need of multiple servers for each deployed application (e.g. a server each for production, development, test, backup, etc.). Second, largely for historical reasons, servers tend to be deployed throughout an organization. The resulting wide distribution of many servers results in reduced IT system utilization and decreased organizational effectiveness.

Given the power of modern computing systems, this wide distribution of a many servers results in a large number of underutilized servers that nonetheless require full system administration effort (thus the saying .10% utilization but 100% administration.). Organizational effectiveness is diminished in a number of ways. As a result of the uncoordinated selection of applications and systems configurations, there tends to be an irrational diversity in the servers deployed within an organization.

As a result, effective user support is compromised, opportunities for easy cooperation or consolidation are unnecessarily limited, and bulk purchasing power is lost. Furthermore, the unnecessarily complex computing environment compromises disaster recovery planning and IT security efforts. And lastly, physical and organizational scale complicates basic administrative efforts (inventory management, etc.).

The general strategy of server consolidation is to aggregate IT service loads to increase system utilization and organizational effectiveness. This aggregation can occur at a number of levels:
Organizational: Consolidate control of servers in a single organization.

Physical: Build on organizational consolidation by physically centralizing servers into a smaller number of machine rooms.

Operating System: Increase server utilization by deploying multiple operating system images on a single, physical system.

Storage: Improve storage utilization and support (e.g. backups) by centralizing storage for a number of servers into network attached storage.

Application: Maximize server utilization by consolidating multiple, possibly diverse, application instances onto a single system (OS and hardware).

Each level builds on the previous. The deeper in the list a consolidation effort goes the greater the savings. The full consolidation of a server infrastructure results in the virtualization of server resources where the boundaries of these resources are masked from users and applications. Virtualization results in an agile infrastructure where the resources allocated to a given service can be re-configured in real time, in response to changes in system load or user requirements. The benefits of a virtualized server infrastructure include reduced costs, improved agility and service levels, and a simpler and therefore more robust infrastructure.

The ITTP Server Team proposed the following strategy for server consolidation:

1. Develop a detailed inventory of existing servers.
2. Identify consolidation opportunities, keeping an eye out for opportunities for standardization (in the sense of eliminating irrational diversity), simplification, and storage consolidation.
3. Identify needed transitional or temporary server and network capacity.
4. Plan for staffing changes.
5. Develop or update the disaster recovery plan.
6. Develop or update the cost recovery and billing models.
7. Prioritize and implement.

Security Resource Management
Project Team Members: Brad Smith, Davi Ottenheimer, Ethan Miller, Paul Tatarsky, Steve Zenone

For in depth ITTP team information, please visit: https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPSecurityTeam

Enterprise Applications, Architecture, and Standards
Project Team Members: Eric Goodman, Diane Koletzke, Jeanne Whitney, Phil Waugh, Donna Riggs, Deb Turner

For in depth ITTP team information, please visit: https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPEnterpriseAppsArchitectureStandards
IT Funding Model
Project Team Members: Magge McCue, Lara Mellegers, Marina Ulmishek

For in depth ITTP team information, please visit:
https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTFundingModel

Program Management Office and Portfolio Management
Project Team Members: Mark Cianca, Mel Barracliffe, Linda Kittle, Linda Rhoads

For in depth ITTP team information, please visit:
https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPProgramManagementOffice

Workstation Support
Project Team Members: Aaron Melgares, Chris Kamalani, Gary Moro, Jay Olson, Shawn Duncan, Tammy Heinsohn, Eric Mitchell

For in depth ITTP team information, please visit:
https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPWorkstationSupport
Web Publishing
**Project Team Members:** Robin Ove, Chris Kamalani, Jim Burns, Matthew Kalastro, Bryn Kanar, Beth Guislin, Christina Navarro (Customer Voice Advisor)

To read the full Web Publishing Team report, please visit:  

**For in depth ITTP team information, please visit:**  
https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPWebPublishing

Communication
**Project Team Members:** Mark Cianca, Lisa Bono, Mel Barracliffe, Coleen Douglas, Michelle Erickson, Janine Roeth, Bonita Sebastian, Dan Snodgrass, Warren Mikawa (Envoy Program)

**For in depth ITTP team information, please visit:**  
https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPCommunicationTeam
Appendix B – IT Senior Management Positions

The following are the duties and responsibilities from the job postings for five (5) senior management positions:

- Director Client Relationship Management
- Director Information Technology Services
- Director Core Technologies
- Director Program Management
- Director IT Strategy & Planning

There is another senior management position for which these are forthcoming.

- Director Application Solutions

DIRECTOR, CLIENT RELATIONSHIP MANAGEMENT

SUMMARY OF DUTIES: Under the general direction of the Vice Provost, Information Technology, the Director Client Relationship Management (CRM) will be responsible for managing all aspects of IT’s working relationships with its clients to render high quality service delivery and maximize client satisfaction.

SPECIFIC RESPONSIBILITIES INCLUDE: Client Relationship Management: Oversee a set of Divisional and Cluster Liaisons to manage and grow client relationships across all key campus constituencies. Client relationship activities include: proactively monitor and assess client needs and priorities; identify IT opportunities; escalate and resolve issues; provide tactical and strategic guidance and consultation to clients on the effective use of Information Technology to support their mission. Assign Local IT Specialists to support Divisional and Cluster Liaisons; monitor client needs for services and improvements in service delivery quality; promote and build awareness of services. Consolidated IT Help Desk Function: select and implement a unified IT client problem tracking and resolution system; establish a consolidated IT help team; manage and oversee the IT Help desk function, problem escalation, resolution and data tracking. Management of the IT Field Service function: manage IT field technicians. Client Experience Design: design, implement and continually improve appropriate CRM technology and processes to enhance the client experience in interacting and working with IT.

DIRECTOR, IT SERVICES

SUMMARY OF DUTIES: Under the general direction of the Vice Provost, Information Technology, the Director IT Services will oversee the design, implementation and delivery of a defined set of IT Services (IT Service Catalog) to clients. The Director will manage a team of IT Service Managers who have responsibility for the design and delivery of specific IT services for clients at agreed service levels and costs.

SPECIFIC RESPONSIBILITIES INCLUDE: IT Service Management Planning: work with the IT leadership team to identify IT Service needs and opportunities and develop a Catalog of IT Services; work with IT Leadership to ensure that the Catalog of IT Services meets the current and anticipated needs of clients; act as the custodian of the IT Service Catalog; manage IT Service Maintenance and Evolution; lead ongoing IT Service Planning efforts; decommission unused or outdated IT Services. IT Service Design & Packaging: mentor and guide a team of IT Service Managers and support staff to specify and design services; develop processes and standards to guide IT Service definition, development and packaging. IT Service Implementation & Education: work with others to configure and develop the processes, technology, standards and policies to implement each IT Service; establish Service Level Agreements; promote and build awareness of IT Services.

DIRECTOR, CORE TECHNOLOGIES

SUMMARY OF DUTIES: Under the general direction of the Vice Provost, Information Technology, the Director Core Technologies will be responsible for managing all consolidated IT systems, network
and telecommunications resources and providing a secure and stable computing environment for the campus.

SPECIFIC RESPONSIBILITIES INCLUDE: Server, Network, and Telecommunication Management: define consolidated and secure technology architecture to support the campus direction; manage consolidated server operations; work with the others to ensure that adequate systems and network capacity is in place to support applications development and production environment needs; work with others to ensure that agreed service levels are met or exceeded; manage the assignment and allocation of systems engineers in line with campus priorities; oversee ongoing IT technology scanning, evaluation and consulting; manage network and telecommunications planning, operations and infrastructure. Desktop Infrastructure: in collaboration with others, manage the infrastructure aspects of consolidated desktop support on campus, including managing the desktop load set and acquiring desktop software and hardware. IT Security and Disaster Recovery: define IT Security Architecture; implement IT Security standards; oversee disaster recovery, backup planning and provisioning.

DIRECTOR, PROGRAM MANAGEMENT OFFICE

SUMMARY OF DUTIES: Under the general direction of the Vice Provost, Information Technology, the Director of the Program Management Office is responsible for overseeing the management of all IT Programs and Projects, developing project management methods and standards, and fostering the development of strong project management competencies throughout the IT organization.

SPECIFIC RESPONSIBILITIES INCLUDE: Program & Project Management: provide project and program management services; provide program and project management coaching, mentoring and training; work with others to support IT planning efforts and the portfolio management process; conduct project management review and audits as required. Program Management Office: define and apply standard project management methodology to improve quality and effectiveness of project management efforts; manage a consolidated project reporting and tracking process to give overall visibility to all IT program and project efforts; identify, select, implement and support software tools in support of program and project management; facilitate the IT resource management allocation process; provide project scoping, estimating and feasibility analysis services.

DIRECTOR, IT STRATEGY & PLANNING

SUMMARY OF DUTIES: Under the general direction of the Vice Provost, Information Technology, the Director will be responsible for defining and managing the IT planning process and ensuring its alignment and integration with campus and divisional strategies and priorities. The Director works on a continual basis with the Vice Provost Information Technology, Principal Officers, IT Directors and IT Divisional Liaisons to ensure that value derived from the total IT investment for the campus is maximized.

SPECIFIC RESPONSIBILITIES INCLUDE: IT Strategy and Planning: identify strategic opportunities that support the mission of the university; define and manage the strategic and operational planning process; create and manage an IT Performance Measurement Scorecard; work with others to implement robust client feedback and assessment processes; manage the IT Development Portfolio; work with others to commission programs and projects to implement portfolio initiatives. IT Policy and Standards and Governance: manage and facilitate an IT standards framework; coordinate the development of IT policies and standards across the IT function; work with the Vice Provost of IT to establish and facilitate effective IT governance bodies and mechanisms (Strategic, Operational and Technical) to maintain and ensure IT accountability, alignment and to implement standards and policies.
Appendix C – ITTP Event Timeline

The following is a summary of discussions and consultations on the IT Transformation Program from January to July. This does not include the regular meetings of the individual ITTP teams and the ITTP Coordinating Team.

January 2004
- ITTP Steering Committee Meeting - January 14, 2004
- All ITTP Teams: ITTP Launch - January 27 & 28, 2004
- IT Town Hall – January 30, 2004

February 2004
- Staff Advisory Board – February 4, 2004
- ITTP Steering Committee Meeting - February 11, 2004
- IT Town Hall – February 24, 2004
- ITTP Steering Committee Meeting - February 25, 2004

March 2004
- ITTP Steering Committee Meeting - March 24, 2004

April 2004
- IT Town Hall – April 1, 2004
- ITTP Steering Committee Meeting - April 14, 2004
- IT "All Hands" Café - April 23, 2004

May 2004
- IT Town Hall – May 6, 2004
- Academic Senate Subcommittee Computing and Telecommunications – May 14, 2004
- ITTP Steering Committee Meeting - May 15, 2004
- Academic Senate Subcommittee Committee on Teaching – May 19, 2004
- Executive Budget Committee – May 26, 2004

June 2004
- Academic Senate Subcommittee Committee on Research – June 2, 2004
- ITTP Steering Committee Meeting - June 9, 2004
- All ITTP Teams Meeting - June 15, 2004
- Executive Budget Committee – June 24, 2004
- Dean’s Council – June 29, 2004
- Large Academic Support System Owners (LASSO) – June 29, 2004
- IT Town Hall – June 29, 2004

July 2004
- Academic Department Managers – July 8, 2004
Resources

**ITS Transformation Web Site:**
http://its.ucsc.edu/transformation

**ITTP Phase II: Migration and Planning**
http://its.ucsc.edu/transformation/phase_2.php

**ITTP Program Information:**
https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPProgramInfo

**ITTP Team Work:**
https://supremo.ucsc.edu/twiki/bin/view/ITTP/ITTPTeamInfo