# Staff Transition Status Report

**University of California, Santa Cruz**  
Staff Transition

<table>
<thead>
<tr>
<th>Status Item</th>
<th>Current Status</th>
<th>Prior Status</th>
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<tbody>
<tr>
<td>Overall Project Status</td>
<td><img src="#" alt="Yellow" /></td>
<td><img src="#" alt="Yellow" /></td>
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<tr>
<td>Schedule</td>
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<td>Budget</td>
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<td><img src="#" alt="Yellow" /></td>
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<tr>
<td>Project Risk</td>
<td><img src="#" alt="Yellow" /></td>
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**Status Notes:**

- **Overall Status:** 80% of the project is complete. One TSA is signed, 7 are in review and 2 are being drafted. Four remaining staff members need transition plans or job description updates, most of the communications for “September 1” have been sent out or are ready for distribution.

- **Schedule Performance:** The project remains yellow, as dates have not been met.

- **Budget Performance:** The project’s budget (FTE and Provision $) is currently known.

- **Project Risks:** See Key Issues and Resolutions.

**Accomplishments Since Last Report:**

- TSAs are 61% complete. The Humanities TSA is signed. Arts, Chancellor’s Office, Library, BAS, SocSci, UNEX, and Student Affairs TSAs have been created and are being reviewed. The PBSci and SOE TSAs are being drafted.
- Communications for ITS Division Staff, from the DLs to their divisions, from ITS to Campus and to 2300 Delaware (about retiring an email address to get help) were drafted, reviewed and sent out.
- The 3x5 leave behind cards were drafted, reviewed and are ready for use.
- The flyers for staff and faculty mailboxes were drafted, reviewed and will be ready for distribution.
- 13 staff members had transition plans completed.
- The DLs finished gap analysis against services listed in the service catalog.

**Upcoming / Next Steps:**

- Signed TSAs for Arts, Chancellor’s Office, Library, BAS, SocSci, UNEX, Student Affairs, PBSci, and SOE.
- Prepare “Dog and Pony” presentation that will be presented by Bill, Linda, associated DL.
- Complete last 2 staff transition plans (in BAS)
- Complete last 2 job description updates (in BAS)

**Key Issues and Resolutions:**

- The original milestone date for TSA completion was 9/1. Since TSAs have not been completed for 9 of the 10 divisions, ITS will proceed “as if” the TSAs were in place as staff transition to their new positions. The new deadline for having TSAs signed is 9/29.

**Closed Issues and Resolutions:**

- As we discuss the kinds of work undertaken by current staff, how do we accommodate matrix management processes in the way we [assign work] + [manage staff] = service-based management? 5/31 – This issue is being escalated to critical as we try to move forward with the staff transition. As we look at how to support services, each area within ITS is in a different place as far as implementing processes to support services. The uneven placement is causing issues in our ability to deploy a service. Core Tech needs to complete their work on the service catalog before the DLs will look at normalizing services. After that service levels and gap analysis needs to happen. SLAs will probably be written without these pieces in place.
6/30 – Same as last month.
7/31 – TSA templates have been completed. DLs are working through the service catalog definitions and service levels in order to identify gaps. The DLs will then need to prioritize work and do what ever is necessary to communicate/mitigate remaining work given LITS FTE remaining in the division. This issue will be closed after this month.
- When a division “gives up” resources to the center, what’s the decision about the scope of the services provided by “John Doe”? How are service levels defined for divisions? 4/29 – This was, in part, under discussion of the last SM/DL meeting. It is up to the unit manager informed by governance as to which services most important to a given area work load. 5/31 – In the future, Application Solutions will set up and use governance on a per division basis to help set priorities. IT Service Managers will also have the responsibility to help understand priorities for a service area. In the near term, the DLs are meeting with core ITS units to determine service levels and gap analysis for each service provided. This information will feed the divisional SLAs.
6/30 – This issue continues to loom above our collective head. We will need to come to terms with this issue this month when we work out the timing of the staff transitions.
7/31 – The roadmap statements, service definitions from the service catalog, and gap analysis all inform this issue. This issue will close as the remaining staff members are transitioned and the DLs begin to mitigate services or service levels remaining.
- DLs will be managing staff that support servers for “at least another year” as CT develops the central server service (unless as-needed, case by case). How will CT create and communicate expectations for service management standards in this interim period? 4/29 – This was discussed at the SM/DL meeting at length. One of the actions of the meeting is to have CT come into alignment with CRM and Application Solutions. 5/31 – CT still needs to come into alignment with CRM and Application Solutions as far as supporting services. This remains a critical issue. Also a server inventory is being compiled and will be assessed for risk and resource planning. Migration plans are needed.
6/30 – Roadmap statements have been appended to the TSA, which will act as a bridge for services that will be ready soon. The Server Consolidation Project has rearranged their schedule to pull in dates to be ready to provide server support earlier.
7/31 – The server risk assessment will be completed in August. Early adopters are being locked at for moving to VM. A plan will be developed scheduling the high-risk servers first. DLs are doing their own mini-consolodations and updating to relieve some of the risk as well. This issue will be closed after this month.
- What principles inform how/when staff who are generalists start to become specialists? 5/31 – For the most part, people will be in their new roles between 7/1 and the start of fall quarter. The Staff Transition Plan will state the details of when/to where/from what workload/to what work load/what training is needed. 4/29 – This was, in part, under discussion of the last SM/DL meeting. It is up to the unit manager informed by governance as to which services most important to a given area work load. 6/30 – We have a template that will be a good tool to capture current and new responsibilities, along with training needed, transition date, and other related information for manager and staff member. This is the how. This month we will deal with the when.
7/31 – There are 14 staff members that need to complete transition. Seven of those are in-progress now. This issue will be closed after this month.
- The Staff Transition Project Charter has not been completely written. It has not been vetted and approved by SMT. 5/31 – No progress on this issue was made this month.
6/30 – Will be completed this month. Enough information is known to write this document.
7/31 – An updated charter was reviewed by the DLs and SMT this month. Ann will seek SMT approval this month. Ann is already using the new plan and schedule to communicate and gain status. This issue will be closed after this month.

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<thead>
<tr>
<th>Key Upcoming Milestones:</th>
<th>Completion Date</th>
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<tbody>
<tr>
<td>Prepare, review and get signed TSAs (SA, BAS, Arts, Library, UNEX, Chancellors Office, SOE, PBSci, SocSci)</td>
<td>Was 9/1</td>
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<tr>
<td>Complete 2 Transition Plans (BAS)</td>
<td>Was 9/1</td>
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<td>Complete 2 Job Description Updates (BAS)</td>
<td>New 9/8</td>
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<td>Prepare “Dog and Pony” presentation by Bill, Linda and DL</td>
<td>9/15</td>
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<td>Close Staff Transition Project</td>
<td>10/1</td>
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Ann Berry-Kline 9/1/06
Project Manager

Bill Hyder
Project Sponsor (if applicable)

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