Staff Transition Status Report

University of California, Santa Cruz
Staff Transition

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

<table>
<thead>
<tr>
<th>Status Item</th>
<th>Current Status</th>
<th>Prior Status</th>
<th>Status Notes:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Project Status</td>
<td>Red</td>
<td>Red</td>
<td>- Overall Status: There is a lot of work to be completed by 9/1. The milestone “Staff Transition Plans complete” was not made as scheduled on 7/1. The 3-signed TSAs (was SLAs) by 7/15 are in serious jeopardy of being missed.</td>
</tr>
<tr>
<td>Schedule</td>
<td>Red</td>
<td>Red</td>
<td>- Schedule Performance: The amount of work in the near future that needs to happen is ambitious and depends on many groups pulling together in the same direction.</td>
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<tr>
<td>Budget</td>
<td>Yellow</td>
<td>Yellow</td>
<td>- Budget Performance: The project’s budget (FTE and Provision $) is currently known.</td>
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<tr>
<td>Project Risk</td>
<td>Red</td>
<td>Red</td>
<td>- Project Risks: See Key Issues and Resolutions. Many risks exist that put the project in jeopardy of completing as planned.</td>
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Accomplishments Since Last Report:
- Transitional Service Agreements (Used to be called SLAs) were reviewed and modified by DLs and SMT. This should be finalized early in July. Appendix A is under development. The newly created roadmap statements for Business Systems, Web Presence, Data Center and Desktop Support will be finalized in July. Since the TSA is not finalized, the milestone to have 3 TSAs signed by 7/15 is in jeopardy of not being met.
- The DLs continued to solidify staff roles (LITS, Support Center, App Sol, CT) and began to identify which staff will require staff transition plans. A template is available to help capture current and new responsibilities, timing of the transition, and training needed. The milestone to have the transition plans completed by 7/1 will not be met. A new plan will need to be created and vetted with SMT and DLs.
- The DLs and Application Solutions met to discuss and negotiate roadmap statements, service definitions and level for business systems and web presence services. This will continue into July in order to aid the DLs in continuing gaps in service analysis.
- The DLs and Support Center met to discuss and negotiate desktop standards, service definitions, service levels, and assumptions. The DLs have taken that information to start identifying gaps in service for their divisions.

Upcoming / Next Steps:
- The Staff Transition Project Charter needs to be completed. Ann will do the rewrite and have the SMs/DLs review it. It will go to SMs for final approval there after. As part of this, the schedule/milestones will be re-evaluated.
- Finalize TSA. Finalize the service agreement template. Finish roadmap statements from Appendix A.
- Prepare for and hold working meetings between the DLs and Apps Solutions to continue to work on understanding service definitions, and service levels in order to complete gaps in service analysis.
- Prepare for and hold working meetings between the DLs and CT to continue to work on understanding the roadmap statements, service definitions, and service levels in order to complete gaps in service analysis.
- DLs and Support Center and Apps Sol will work on individual staff transition plans. Reallocation workload left behind and timing of the transitions will be challenging.
- Bill and DLs to work on getting Humanities, PBSci and one other division’s TSA signed.

Key Issues and Resolutions
- As we discuss the kinds of work undertaken by current staff, how do we accommodate matrix management processes in the way we [assign work] + [manage staff] = service-based management? 5/31 – This issue is being escalated to critical as we try to move
forward with the staff transition. As we look at how to support services, each area within ITS is in a different place as far as implementing processes to support services. The uneven placement is causing issues in our ability to deploy a service. 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.

- 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.

- 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 have rearranged their schedule to pull in dates to be ready to provide server support earlier.

- 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. 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.

- 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.

### Closed Issues and Resolutions

<table>
<thead>
<tr>
<th>Key Upcoming Milestones</th>
<th>Completion Date</th>
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<tbody>
<tr>
<td>Finalize Staff Transition Project Charter for SMT approval</td>
<td>6/xx- Date not met</td>
</tr>
<tr>
<td>Staff Transition Plans complete; including roadmap statements</td>
<td>7/1 – Date not met; need to re-evaluate</td>
</tr>
<tr>
<td>3 Signed TSAs (Humanities, PbSci and Chancellor’s Office)</td>
<td>7/15; Date in urgent jeopardy of not being met</td>
</tr>
<tr>
<td>All TSAs signed</td>
<td>9/1</td>
</tr>
<tr>
<td>Service names normalized, service levels known and gap analysis completed</td>
<td>9/1</td>
</tr>
<tr>
<td>Prepare for and train transitioning staff</td>
<td>7/1-9/1</td>
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**Ann Berry-Kline**  
Project Manager

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

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**Color Key**

- **Green**  
  Strong probability item will meet dates and acceptable quality.

- **Yellow**  
  Good probability item will meet dates and acceptable quality. Schedule, resource, or scope changes may be needed.

- **Red**  
  Probable that item will NOT meet dates with acceptable quality without changes to schedule, resources, and/or scope.