**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>
<th>Status Notes:</th>
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</thead>
</table>
| Overall Project Status | Yellow         | Yellow       | ❑ Overall Status:  
The project continues to move ahead mostly because of the SM/DL meetings that have taken place. It will be important to keep the project at a very high priority for the division. |
| Schedule          | Yellow         | Yellow       | ❑ Schedule Performance:  
The project is currently on schedule. I am concerned about the amount of work in the near future that needs to happen thus keep the stoplight at a cautious yellow. |
| Budget            | Yellow         | Yellow       | ❑ Budget Performance:  
The project’s budget (FTE and Provision $) is currently known. |
| Project Risk      | Red            | Red          | ❑ Project Risks:  
See Key Issues and Resolutions. Many risks exist that put the project in jeopardy. |

**Project Metrics vs. Plan:**

| Schedule: 0% behind (specifications) | Budget: 0% over |

**Accomplishments Since Last Report:**

- Bill met with each DL and the transitioning staff to talk about the transition.
- The service catalog tool was populated by DLs and managers for use at the SM/DL meeting. Lots of work went into this; the tool contains lots of great information. Thank you to all that populated the tool!
- The second SM/DL meeting was held. Good progress was made. Information was presented about where budget $ are spent. CRM talked about which services will be supported in broad terms. Application Solutions presented their charter receiving good feedback. Minutes and action items were sent out. Next steps will be sent out the first week in May.

**Upcoming / Next Steps:**

- The Staff Transition Project Charter needs to be reworked given the new approach. Ann will do the rewrite and have the SMs/DLs review. It will go to SMs for final approval there after.
- Prepare for and hold third SM/DL meeting to begin further the understanding of local and global services given FTE.
- DLs to begin to normalize the service catalog verbiage.
- DLs to start gap analysis.
- CT, Apps – finish work packet from first meeting. Present and discuss at next SM/DL meeting.

**Key Issues and Resolutions**

- The assignments of staff, at least those in this first transition for Support Center, need to be solidified. Rotations are being based on specific divisions, competencies and geographic location. 4/29 – The first SM/DL meeting slotted staff to positions. The second SM/DL meeting looked at FTE available to provide specific services. Because of this new approach, rotations may not be necessary.
- The deliverables for the first phase of the Desktop Support Project need to be in place before the rotations can begin. The project plan is being written. It is not known if the deliverables will be ready in conjunction with the start of the rotations. 4/29 – The project charter is being presented to Bill Hyder, the sponsor on Tuesday, May 2.
- 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?
• When a division “gives up” resources to the center, what’s the decision about the scope of the services provided by “John Doe”? How are service levels defined for divisions? 4/29 – This was, in part, under discussion of the last SM/DL meeting. It is up to the unit manager informed by governance as to which services most important to a given areas work load.

• 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.

• What principles inform how/when staff who are generalists start to become specialists?
• How do we disentangle partial FTE and multiple assignments so that staff can begin to transition?
• The Staff Transition Project Charter has not completely written. It has not been vetted and approved by SMT.

Other Issues and Resolutions
• Optional but important information for stakeholders

<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>5/xx</td>
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<tr>
<td>SM/DL meeting to hear presentations from Application Solutions and Core Tech</td>
<td>5/mid-xx</td>
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<tr>
<td>SM/DL meeting to continue to work on global and local services, service health, etc</td>
<td>6/6</td>
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<tr>
<td>Services supported and service levels defined</td>
<td>7/1</td>
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<tr>
<td>Prepare for and train transitioning staff</td>
<td>7/1-9/1</td>
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Ann Berry-Kline, Project Manager

Project Sponsor (if applicable) Date

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.