# Staff Transition Status Report

## University of California, Santa Cruz Staff Transition

**For period:** July, 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>
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</thead>
</table>
| Overall Project Status | Yellow | Red | - Overall Status:  
The Humanities TSA was reviewed and signed this month.  
17 remaining staff members require completed transition plans or rewritten job descriptions. A variety of communications are being developed that in part talk about Staff Transition changes. The DLs continue to work on service gap analysis. |
| Schedule          | Yellow | Red | - Schedule Performance:  
The updated schedule better denotes what work specifically remains. There is still much to do with little slack remaining. |
| 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. |

## Accomplishments Since Last Report:
- The Transitional Service Agreements (Used to be called SLAs) were finalized early in July. Appendix A containing the road map statements was also finalized in July.
- The Humanities TSA was signed on 7/31. 1 TSA signed, 9 to go!
- The BAS, Student Affairs, and SOE TSA were started.
- Transition plans were worked on for the 14 ITS staff members that are in the process of transitioning.
- The DLs and Application Solutions met a second time to discuss and negotiate roadmap statements, service definitions and level for business systems and web presence services.
- Set up the CT/DL meeting to review the service catalog definitions, service levels and resulting gaps. The roadmap statements for Data Center were reviewed and approved.
- The Staff Transition Project Charter was reviewed by the DLS and SMT.
- A communications plan was developed for the variety of communications that need to happen for “Sept 1”. These communications are a part of the Desktop Support and Staff Transition Projects and IT Request training and rollout.

## Upcoming / Next Steps:
- Each DL will continue to work on their divisions TSA.
- The communication for training times for IT Request will be created, reviewed and sent out in early August.
- The communication for ITS Division Staff regarding changes in where to get technical help will be prepared, reviewed, and sent out in late August.
- A flier and leave behind cards will be created as part of changes going on in Support Center.
- A communication will be prepared for Campus and sent out in early September.
- 17 staff members will have transition plans completed or job descriptions updated.
- DLS will finish up their gap analysis.
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.

  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 areas work load. 5/31 – In the future, Application Solutions will set up and use governance on a per division basis to help set priorities. IT Service Managers will also have the responsibility to help understand priorities for a service area. In the near term, the DLs are meeting with core ITS units to determine service levels and gap analysis for each service provided. This information will feed the divisional SLAs.

  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 looked at for moving to VM. A plan will be developed scheduling the high-risk servers first. DLs are doing their own mini-consolidations 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 workload/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 how, this month. 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.

Closed Issues and Resolutions

<table>
<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>9/1</td>
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<tr>
<td>Review and send out Divisional Communication regarding 9/1 changes</td>
<td>Now- mid-August</td>
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<tr>
<td>Review and send out Campus Communication regarding 9/1 changes</td>
<td>Now-9/5</td>
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<tr>
<td>Service definitions normalized, service levels known and gap analysis completed</td>
<td>9/1</td>
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<tr>
<td>Complete 14 Transition Plans (BAS, SA, SocSci, Library)</td>
<td>7/1-9/1</td>
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Ann Berry-Kline
Project Manager
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<tr>
<th>Yellow</th>
<th>Red</th>
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<tbody>
<tr>
<td>Good probability item will meet dates and acceptable quality. Schedule, resource, or scope changes <strong>may</strong> be needed.</td>
<td>Probable that item will <strong>NOT</strong> meet dates with acceptable quality without changes to schedule, resources, and/or scope.</td>
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Bill Hyder  
Project Sponsor (if applicable)  
Date