Staff Transition Status Report

University of California, Santa Cruz
Staff Transition

For period: March, 2006

Submitted by: Ann Berry-Kline

Distribution: Bill Hyder, Mark Cianca, ITTP PMs, DLs, SMT

Status Notes:
- Overall Status:
The project continues to move ahead mostly because of the SM/DL meeting that took place. It will be important to keep the project at a very high priority for the division.

- 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 Performance:
The project’s budget (FTE and Provision $) is currently known. The $s that came over in January were fewer than expected. It will take some time to understand what that means in terms of services supported.

- 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:
- Review comments from DLs were incorporated into the Staff Transition Project Plan.
- The DLs made a first pass of the roster of IT Staff to be transitioned.
- An SM/DL meeting was held to reconcile the first pass of the roster, to develop next steps and a timeline for completing the staff transition.
- Transition of several staff to Application Solutions has begun.
- Information from the DLs regarding where computers (by platform) and IT office space is located was sent to Vicki Davis. Also, the DLs sent best guesses at how many macs and pcs are located, by building, and where IT office space is for those staff slated to move into the Support Center.
- Work packets were sent to the SMs and DLs in preparation for the next iteration of the staff transition meeting.
- Interviews for the Support Coordinator position went well. Multiple offers will be made from the initial pool.

Upcoming / Next Steps:
- Re-work the Staff Transition Project Plan to reflect new approach. Send to SMT and DLs for final blessing.
- Firm up and finalize plan for staff transition rotations to begin in Support Center. Bring to SMT for approval. Hire 3 FTE for “priming the pump”. Begin training.
- Prepare for and hold second SM/DL meeting to begin next steps of staff transition.
- Bill to meet with each transitioning staff member and their DL to talk about the transition.
- DLs/SMs to complete as much as possible of the work packet before the 4/26 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.
- 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.

- How are new hires since the “inventory” accounted for in the totals under discussion? This is being handled as a part of the work packet when services supported are defined with respect to fte within the existing unit + the proposed transitioning staff.
- 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?
- The library presented a case where a .25 FTE buy out of an existing provision would provide additional web services capacity (complements the example cited by Arts)
- 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?
- 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?
- 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?

Other Issues and Resolutions
- Optional but important information for stakeholders

Key Upcoming Milestones:

<table>
<thead>
<tr>
<th>Event</th>
<th>Completion Date</th>
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<tbody>
<tr>
<td>Finalize detailed staff transition plan for Support Center for SMT approval</td>
<td>4/xx</td>
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<tr>
<td>SMT/DL meeting to begin defining services supported given existing and proposed FTE</td>
<td>4/26</td>
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<tr>
<td>Hire and train 3 FTE for Support Center Rotations</td>
<td>5/1</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

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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.