IT Transformation Program Charter
Version 2.9
April 15, 2004.
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1 Introduction

This document summarizes the current set of IT transformation projects that are required to move the UCSC Information Technology function to the new future state IT Service Delivery Model. Together, these projects define the IT Transformation Program (ITTP). This program is an integral part of the overall Executive Budget Committee (EBC) process. This document will be updated by the IT Program Management Office as the program evolves.

The program is currently in the Migration Planning Phase (January – May 2004). During this phase project teams will design solutions to meet the specific objectives of each project. Each team will also develop an implementation approach for the next phase of the program (Implementation Phase). Each implementation approach will define the timeline and resources (people and funding) required for successful implementation. Implementation will begin on subsequent IT management and EBC approval. Specific start dates for implementation will be developed by each team as soon as possible, however it is anticipated that all the projects outlined here will begin implementation no later than June 2004.

These projects will design and implement the necessary changes to the IT operating model (people, processes and technology) to implement the new service delivery vision. This will involve building and evolving new IT capabilities, and creating a new IT culture to support the campus mission as a consolidated IT function.

A project definition is provided for each project in terms of its objectives, major deliverables, project managers and team members. Successive work sessions with the teams will define the scope and characteristics of each project in more detail (approach, timing, and specific resources). In addition some of these projects may be reconstituted as working groups where a formal project management approach is not warranted.

Since each project is responsible for refining one of more components of the new IT Service Model, the model is shown below for reference purposes. As the work on these projects progresses, the IT Service model will need to be refined and evolved. An IT Transformation Program Coordinating Committee will be established to manage the feedback on and evolution of the IT Service Model, to preserve the integrity of the model vision, and to provide guidance and counsel to the project teams.
Figure 1 New IT Service Delivery Model
2 Program Goals.

The primary goal of the IT Transformation Program is to develop a detailed design for the implementation of the new IT Service Delivery Model. This goal has been decomposed into the following objectives:

<table>
<thead>
<tr>
<th>Program Objective 1:</th>
<th>Develop the detailed solution designs for the major components of the new IT Service Delivery Model.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Objective 2:</td>
<td>Develop the implementation plans and identify the one-time costs to implement the solution designs.</td>
</tr>
<tr>
<td>Program Objective 3:</td>
<td>Define the set of IT Services to be implemented, their associated ongoing costs, and the appropriate scaleable, funding mechanisms for the different levels of service (Bronze or Platinum).</td>
</tr>
<tr>
<td>Program Objective 4:</td>
<td>Design and implement a new consolidated IT organization structure to support and manage the delivery of IT services to the entire campus.</td>
</tr>
<tr>
<td>Program Objective 5:</td>
<td>Identify the standards, policies and governance structures that will be required to support service delivery by the new IT organization.</td>
</tr>
</tbody>
</table>
3 Program and General Project Deliverables.

A set of corresponding program deliverables have been defined to address the program objectives. Since the ITTP program is large in scope, these objectives will be achieved through the combined efforts of the multiple projects that make up the ITTP Program.

This section describes a set of program level deliverables as well as a set of general or common deliverables that have been defined across all the projects in ITTP Program. These deliverables are intended to serve as proxies for the specific deliverables that each project team will create and to provide integration points for the work of the separate teams throughout the program. For example, ITT1: Solution Design will align with the specific design deliverables that the Security Administration or the Web Publishing team will develop.

All project teams are expected to create their own instances of each of these general deliverables, except where the content of a general deliverable is either:
   a) Already addressed by a specific project deliverable defined by the project team, or
   b) Deemed not applicable or necessary by ITTP Program Management.

<table>
<thead>
<tr>
<th>Code</th>
<th>General Deliverable Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITT1:</td>
<td>Solution Design</td>
<td>The overall solution structure and approach that meets the goals and objectives of the project. The solution design provides the answer to the problems given to each team to solve.</td>
</tr>
<tr>
<td>ITT2:</td>
<td>Bronze Service Definitions.</td>
<td>Services included in Bronze, and Bronze “plus” levels. Any IT service that is identified or designed by a team must be described in terms of its description, target customers, service level measures and a scaleable pricing metric. Includes pricing principles for services beyond Bronze (local choice).</td>
</tr>
<tr>
<td>ITT3:</td>
<td>Solution Ongoing Costs</td>
<td>An estimate of the annual costs to sustain the solution design including: people, hardware, software, facilities, operating supplies, etc.</td>
</tr>
<tr>
<td>ITT4:</td>
<td>Organization Requirements</td>
<td>Specification of the roles, responsibilities, job types, number of people by type, and reporting lines that will be required to support a team’s solution design.</td>
</tr>
<tr>
<td>ITT5:</td>
<td>Solution Implementation Plan</td>
<td>A plan that indicates the major tasks, sequence of work and milestones necessary to begin implementation of the team’s solution design no later than June 2004.</td>
</tr>
<tr>
<td>ITT6:</td>
<td>Solution One-Time Costs</td>
<td>An estimate of the investments that UCSC will need to make to implement the team’s solution design.</td>
</tr>
<tr>
<td>ITT7:</td>
<td>Identification of IT Standards, Policy and Governance Required.</td>
<td>Identification of any IT standards, policies and governance that will need to be defined and implemented to support a team’s solution design.</td>
</tr>
</tbody>
</table>

For more info, please see: its.ucsc.edu
| ITT8: | ITS Service Delivery Model Example and Test Cases. | Examples that test and demonstrate how the teams’ solutions design will fit with the conceptual ITS service delivery model (For examples see the IT Service Delivery Vision final report). |

For more info, please see: [its.ucsc.edu](http://its.ucsc.edu)
4 Program Structure.

At present the ITTP program has been organized into 10 Projects, each with its own project manager and project team (See Section 6 Project Descriptions.) As the ITTP program evolves other projects may be added or some projects may be re-scope as required. Overall ITTP Program Management will be the joint responsibility of Janine Roeth and Mel Barrcliffe (AVCOR Consulting).

An overall ITTP Program Coordinating Committee has been established to:
- Provide program leadership and integration.
- Provide a forum for resolving or escalating program issues.
- Maintain integrity of the Service Delivery vision as it evolves through the work of the project teams.
- Provide Stewardship and evolution of the IT Service Delivery Model.
- Coordinate integrated status reporting to IT leadership, ITTP Steering Committee and EBC.

The ITTP Coordinating Committee will meet on a bi-weekly basis and be chaired by Janine Roeth. The committee will be comprised of all ITTP project managers, some special members and Mel Barrcliffe of AVCOR who will provide advisory and facilitation support.

For more info, please see: [its.ucsc.edu](http://its.ucsc.edu)
ITTP Program Coordinating Committee Members

<table>
<thead>
<tr>
<th>Member</th>
<th>Program Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Janine Roeth</td>
<td>ITTP Co-Program Manager</td>
</tr>
<tr>
<td>Mel Barracliffe</td>
<td>ITTP Co-Program Manager</td>
</tr>
<tr>
<td>Celena Allison</td>
<td>Organizational Design</td>
</tr>
<tr>
<td>Lisa Bono</td>
<td>IT Communications</td>
</tr>
<tr>
<td>Scotty Brookie</td>
<td>Co-Project Manager Client Relationship Management.</td>
</tr>
<tr>
<td>Mark Cianca</td>
<td>Project Manager Communications</td>
</tr>
<tr>
<td>Coleen Douglas</td>
<td>Project Manager IR Culture, Values, and Symbols.</td>
</tr>
<tr>
<td>Eric Goodman</td>
<td>Project Manager Enterprise Applications, Architecture and Standards.</td>
</tr>
<tr>
<td>Beth Guislin</td>
<td>Co-Project Manager Client Relationship Management.</td>
</tr>
<tr>
<td>Linda Kittle</td>
<td>Co-Project Manager Program Management Office &amp; Portfolio Management.</td>
</tr>
<tr>
<td>Magge McCue</td>
<td>Project Manager IT Funding Model.</td>
</tr>
<tr>
<td>Peter McMillan</td>
<td>Program Advisor.</td>
</tr>
<tr>
<td>Aaron Melgares</td>
<td>Project Manager Workstation Support.</td>
</tr>
<tr>
<td>Fana O'Halloran</td>
<td>Data Guardian – Data Collection and analysis support.</td>
</tr>
<tr>
<td>Robin Ove</td>
<td>Project Manager Web Publishing.</td>
</tr>
<tr>
<td>Linda Rochin</td>
<td>Administration Support</td>
</tr>
<tr>
<td>Brad Smith</td>
<td>Project Manager Server Resource Management and Security Administration.</td>
</tr>
</tbody>
</table>

The ITTP Organizational Change Team is responsible for guiding the IT Transformation from an overall organizational change management perspective. Members of this team are members of the ITTP Coordinating Team as well. This team is led by Larry Merkley and consists of the following members:

ITTP Organization Change Management Team Members

<table>
<thead>
<tr>
<th>Member</th>
<th>Team Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Larry Merkley</td>
<td>Program Sponsor</td>
</tr>
<tr>
<td>Mel Barracliffe</td>
<td>Program Advisor</td>
</tr>
<tr>
<td>Pat LeCluyer</td>
<td>Program Advisor</td>
</tr>
<tr>
<td>Bill Hyder</td>
<td>Program Advisor</td>
</tr>
<tr>
<td>Terry Shalk</td>
<td>Program Advisor</td>
</tr>
<tr>
<td>Janine Roeth</td>
<td>Program Advisor</td>
</tr>
</tbody>
</table>

The ITC Committee, augmented in order to provide adequate key stakeholder representation, will act as the steering committee for the ITTP program.

A Transformation Executive Committee has been established to provide oversight and governance to the ITTP program and business transformation efforts that are part of the Executive Budget Committee process for the campus.

For more info, please see: its.ucsc.edu
5 Program Milestones.
The following milestones have been established for ITTP. Project specific milestones will be established by individual projects team that will align with these overall milestones for the program.

<table>
<thead>
<tr>
<th>Program Deliverable</th>
<th>Milestone Description</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT Transformation Program Structure</td>
<td>Program Launch</td>
<td>27-Jan-04</td>
</tr>
<tr>
<td>IT Transformation Program Structure</td>
<td>Project Charters Completed. ITTP Program Management in place.</td>
<td>15-Feb-04</td>
</tr>
<tr>
<td>IT Organization Structure</td>
<td>New IT Leadership Structure Defined</td>
<td>15-Mar-04</td>
</tr>
<tr>
<td>ITT1: Solution Design</td>
<td>High Level Completed</td>
<td>15-Mar-04</td>
</tr>
<tr>
<td>ITT2: Bronze Service Definitions. ITT7: Identification of IT Standards, Policy and Governance Required.</td>
<td>High Level Completed.</td>
<td>31-Mar-04</td>
</tr>
<tr>
<td>ITT3: Solution Ongoing Costs</td>
<td>High Level Completed</td>
<td>15-Apr-04</td>
</tr>
<tr>
<td>ITT4: Organization Requirements</td>
<td>High Level Completed</td>
<td>15-Apr-04</td>
</tr>
<tr>
<td>ITT1 Solution Design</td>
<td>Detailed Completed</td>
<td>15-Apr-04</td>
</tr>
<tr>
<td>ITT8: ITS Service Delivery Model Examples and Test Cases</td>
<td>ITTP Program team walkthrough.</td>
<td>22-Apr-04</td>
</tr>
<tr>
<td>ITT2: Bronze Service Definitions. ITT7: Identification of IT Standards, Policy and Governance Required.</td>
<td>Detailed Completed.</td>
<td>30-Apr-04</td>
</tr>
<tr>
<td>ITT5: Solution Implementation Plan ITT6: Solution One-Time Costs</td>
<td>High Level Completed.</td>
<td>30-Apr-04</td>
</tr>
<tr>
<td>ITT1 Solution Design</td>
<td>Synthesized at the Program Level</td>
<td>30-Apr-04</td>
</tr>
<tr>
<td>ITT3: Solution Ongoing Costs ITT4: Organization Requirements</td>
<td>Detailed Completed.</td>
<td>15-May-04</td>
</tr>
</tbody>
</table>

For more info, please see: its.ucsc.edu
<table>
<thead>
<tr>
<th>ITT3: Solution Ongoing Costs</th>
<th>Synthesized at the Program Level.</th>
<th>31-May-04</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITT4: Organization Requirements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ITT5: Solution Implementation Plan</td>
<td>Detailed Completed.</td>
<td>31-May-04</td>
</tr>
<tr>
<td>ITT6: Solution One-Time Costs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ITT5: Solution Implementation Plan</td>
<td>Synthesized at the Program Level for Approval.</td>
<td>15-Jun-04</td>
</tr>
<tr>
<td>ITT6: Solution One-Time Costs</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
6 Project Descriptions.
### 6.1 IT Culture, Values, and Symbols.

**Project Manager:** Coleen Douglas

**Project Team Members:**
- Bruce Horn
- Henry Burnett
- Lisa Bono
- Vicki Davis
- Larry Merkley (Advisor)

**Project Goals/Objectives:**

1. Define a future state unifying culture for the new IT organization.
   - Establish principles, norms, values and behaviors we aspire to as an organization, which are connected to the division’s strategies.

2. Define how to get from current state to future state.
   - Identify a set of activities to foster development of the new Consolidated IT organization culture
   - Create a communication plan for the organization’s services and values
   - Create a change management plan for the organization’s services and values
   - Identify the required investments that ITS would need to achieve its desired culture change activities, communication plan, and change management plan.

3. Define symbols that represent the new IT organization
   - Determine Consolidated IT brand identity
   - Identify the required investments that ITS would need to make to achieve its desired branding goals

4. Build campus readiness for the transformation
   - Create an atmosphere of trust during the change process
   - Engage IT people in the process of developing the new culture

**Project Deliverables:**

1. Brief, inspiring Future State description for new IT organization.
2. Statement of Principles and/or Statement of Values.
3. Establish description of activities and time frame to foster development of the new IT organization's culture.
4. Determine an effective method for soliciting, collecting, analyzing, and advertising feedback regarding the new IT organization.
5. New IT Organization Name, Logo, messaging values, look and feel.
6. Cost and personnel analysis.

For more info, please see: [its.ucsc.edu](http://its.ucsc.edu)
Major Project Interdependencies:

- Communications Team
- ITSAC (Change Management Team)

Notes: This group requires very close collaboration with Larry Merkley.
6.2 Client Relationship Management

Project Manager: Beth Guislin & Scotty Brookie

Project Team Members:
- Catherine Soehner
- Jackie Davis
- Lynda Potzus
- Magge McCue
- Naomi Gunther
- Ramon Berger
- Terry Schalk
- Warren Mikawa
- Phillip Stark
- Magge McCue (Advisor)
- Susan Willats (Advisor)

Project Goals/Objectives:

1. Define a customer/client relationship management process that specifies the roles, responsibilities, processes, principles and procedures to support the implementation of client relationship management as outlined by the new IT Service Delivery model.
   - Identify the principles that guide the client relationship management
   - Create a problem resolution and problem escalation process
   - Describe the roles, relationships and responsibilities of each of the key participants in the process (Users, Divisional Liaisons, Client Service Representatives, Client Service teams, and others who are "touching" the client.)
   - Identify the desired attributes and skills of the incumbents for each of the identified positions.
   - Identify a process through which thematic client concerns can be identified and communicated to the ITS leadership and governance bodies.
   - Define the role and function of the divisional specialists (See Blue Diamond in the IT Service Model) within the account management process.

2. Determine an IT service architecture for how clients will perceive services, and how service providers connect the sets of services they provide to the client. How does the client interact, select the service, receive the service? The CRM team is charged with defining what a bronze level service is generally, but not the specific service is. Then the CRM team will go to the other ITTP teams and ask them to test the client service model developed by the CRM team with the specific bronze level service developed by the other teams. For example, if the Web Publishing team defines a bronze-level Web Publishing service, they would test that service against the bronze level concept developed by CRM to see if the Web Publishing bronze service has a scalable metric. Magge McCue, a CRM team member and Funding team member, will work across teams to test scalable metrics.
   - Identify the means by which these services will be managed and evolved by the consolidated IT function.
   - Test the service delivery model with service related questions (Scenarios)
   - Determine the nomenclature and terms that the project team (and hence the organization)
Major Deliverables:

1. CRM Solution and Approach: diagrams and overview of CRM principles, service architecture, and process.
2. Bronze-level services definition and priority.
4. Service costs and Savings Potential for each of the service (this will be passed to other service teams, and the results will be tallied to build a business case for each of the IT services).
5. Identify any integrating tools that will be required/involved with establishing policies and standards.
6. Determine appropriate strategies and methods for the education and training of staff and customers (including partnership opportunities with SHR T&D). There are remaining questions about the fine line between training and IT support where the IT staff person trains the client.

Major Project Interdependencies:

- IT Culture, Values and Symbols
  - Principles that guide client relationship management.
- Project Management / Portfolio Management
  - Scope management and service lifecycle input for managing and evolving services.
- IT Funding Model
  - Help with determining funding approach for services.
- Workstation Support
  - Information about hardware and software standards.

Notes: The CRM team will look at both the organizational and technological needs for an effective, enterprise strategy to manage client relationships.
### 6.3 Server Resource Management

**Project Manager:** Brad Smith

**Project Team Members:**
- Lindsay Bass
- Bob Vitale
- John Hammond
- Ken Garges
- Gary Moro
- Steve Hauskins
- Ed Boring
- Gartner Consulting

**Project Goals/Objectives:**
1. Develop a server consolidation plan that will reduce costs, improve “agility” and improve service levels across the campus.
2. Develop a server support organization plan.

**Project Deliverables:**
1. Proposed service portfolio.
2. List of servers to be consolidated.
3. Cost/benefit analysis.

**Major Project Interdependencies:**
- User surveys – Coordination across the ITTP program
- CRM Project: Bronze level definition
- Enterprise Applications, Architecture and Standards Project

**Notes:**
- This team should take a “field trip” (or more) to various locations to observe different approaches and strategies in action (suggest to the team)
- COAST with 80 servers in the Chancellors office might make a good pilot site for the team.

For more info, please see: [its.ucsc.edu](http://its.ucsc.edu)
6.4 Security Administration

**Project Manager:** Brad Smith

**Project Team Members:**
- Davi Ottenheimer
- Ethan Miller
- Paul Tatarsky
- Steve Zenone

**Project Goals/Objectives:**
1. Define a suite of security services that produces cost savings, ensures security of campus IT resources, empowers campus IT resource owners and IT managers.
2. Develop a security management organization plan.

**Project Deliverables:**
1. Select and develop security process architecture.
2. Select security process development team.
3. Develop preliminary security technology inventory.
4. Cost/benefit analysis of the proposed architecture

**Major Project Interdependencies:**

**Notes:**

For more info, please see: its.ucsc.edu
### 6.5 Enterprise Applications, Architecture and Standards.

**Project Manager:** Eric Goodman  

**Project Team Members:**  
- Diane Koletzke  
- Jeanne Whitney  
- Lance Peterson  
- Phil Waugh  
- Raji Sabbagh  
- Coleen Douglas (Advisor)

**Project Goals/Objectives:**

1. Define the application development function for the future state IT organization.  
2. Define a methodology for developing, maintaining, decommissioning and applying standard development practices and technical architecture to Enterprise Services.  
3. Design a process and structure for management and delivery of Enterprise Services.

**Major Deliverables:**

1. Principles for architecture/standards and application development/support functions.  
2. Capabilities, roles, responsibilities and processes of application development/support functions.  
3. Recommendations for bronze services related to application development/support and dependencies on governance and funding.  
4. Oversight models and practices for developing and applying architecture and standards.  
5. Transition plan or identification of transitional issues.

**Major Project Interdependencies:**

**Notes:**

For more info, please see: [its.ucsc.edu](http://its.ucsc.edu)
## 6.6 IT Funding Model

**Project Manager:** Magge McCue

**Project Team Members:**
- Magge will represent the IT function on the campus team.

**Project Goals/Objectives:**
1. Participate in campus project team looking at funding models for services
2. Provide IT perspective and work with the campus team to define suitable IT funding metrics and mechanisms for the future.
3. Engage project team leaders in dialogue and discussion related to their service focus, including identifying services, service levels, service delivery methodologies.

**Major Deliverables:**
1. IT Funding Mechanism
2. Implementation Approach

**Major Project Interdependencies:**
- Will work with team leads to map out specific services in their areas, their costs and the delineation of bronze and bronze plus services.

**Notes:**
- This project represents participation in a campus team effort not an independent IT effort.
- Given that the current teams only focus on a subset of IT services, how will these other services be accounted for in terms of a funding model?
6.7 Program Management Office & Portfolio Management

Project Managers: Mark Cianca

Project Team Members:
- Mel Barracliffe
- Linda Kittle
- Linda Rhoads

Project Goals/Objectives:
1. Establish project and program management capability in IT.
2. Visibility into existing projects and an overall awareness of those projects.
3. Coherence and alignment.

Next Phase:
1. Develop the service offering for project management that could be offered as a service to the campus.
2. Design a rigorous, flexible portfolio management process and supporting procedures to enable campus IT needs to be systematically surfaced, scoped into initiatives, evaluated and prioritized for development and implementation.
3. The Portfolio Management process should provide a holistic approach for identifying IT needs across the campus and determining the best allocation and use of IT investment funds.
4. Provide analytical support to Portfolio Management planning.

Major Deliverables:
1. Standard Program and Project Management Methodology
2. Project Management templates, tools, and examples
3. Program Management Organizational Implications
4. Program Management Pilot
5. Program and Project Management Deployment Plan
6. PMO Presentation for Marty Chemers

Major Project Interdependencies:

Notes:
- This project team will provide program management for the IT Transformation project and PM coaching and support to the other teams in the program. This will enable the development of practical standards for the PMO in a real live test environment.
- Mel Barracliffe of AVCOR Consulting will provide consulting support to this team and help the team establish a full-time PMO leader over the course of the project.
6.8 Workstation Support

Project Manager: Aaron Melgares

Project Team Members:
- Chris Kamalani
- Gary Moro
- Jay Olson
- Shawn Duncan
- Tammy Heinsohn
- Eric Mitchell

Project Goals/Objectives:
1. Develop a unified, consistent campus-wide approach for workstation support and management. The approach should consider all workstation HW platforms, support processes and organization, and the definition of Bronze Level workstation support.
2. Develop an implementation approach for the new process and the investment required.

Project Deliverables:
1. Workstation Support Process
2. Bronze Level Workstation Support Definition
3. Trade-off analysis of workstation ownership alternatives.
4. Implementation Approach

Major Project Dependencies:

Notes:
## 6.9 Web Publishing

**Project Manager:** Robin Ove

**Project Team Members:**
- Chris Kamalani
- Jim Burns
- Matthew Kalastro
- Bryn Kanar
- Beth Guislin
- Christina Navarro (Customer Voice Advisor)

**Project Goals/Objectives:**

1. Design a consolidated approach to providing web publishing capability to the campus that will create an integrated campus web presence (standards, content management, information architecture, roles and responsibilities)
2. Define how this approach will be provided and supported by the central IT function
3. Define an implementation approach.
4. Ready the campus for a full Portal implementation. It will essentially lead to the “birth” of a new IT service for Web Publishing to be provided as part of Bronze Support.

**Major Deliverables:**

1. Consolidated Campus Web Publishing Approach
2. Implementation Approach

**Major Project Dependencies:**

**Notes:**
6.10 Communications.

Project Manager: Mark Cianca

Project Team Members:
- Lisa Bono
- Mel Barracliffe
- Coleen Douglas
- Michelle Erickson
- Janine Roeth
- Bonita Sebastian
- Dan Snodgrass
- Larry Merkley (Advisor)
- Pat LeCuyer (Advisor)
- Liz Irwin (Advisor)

Project Goals/Objectives:
1. Develop a strategy for communicating with the campus community on the IT Transformation program (ITTP) and provide communications support for the IT change management team.
   - Set the direction for the IT newsletter
   - Determine leadership scope for Town Hall meetings
   - Steer the IT Colloquium Sessions.
   - Create an Envoy program (a focused group of communicators for the program).
   - Develop a communications plan and schedule for Larry and others to proactively communicate about the program.
   - Develop and manage the key messages of the transformation (bullet point message, elevator speech, etc.)
   - Guide and foster wide understanding of the transformation effort
   - Providing communications standards and guidance for the other nine teams

Project Deliverables:
1. Communications Strategy, consisting of:
   - Channels/Media
   - Communications Targets
   - Communications Calendar
   - Roles/Responsibilities
   - Managing Messaging to Context
   - Feedback and Measurement: How will we know it is working or not?
**Major Project Interdependencies:**
- All ITTP Project teams
- IT Change Management Team

**Notes:** This group will require very close collaboration with Larry Merkley.
### 6.11 Organizational Design.

**Project Coordinator:** Celena Allison

**Project Team Members:**
- Celena Allison
- Mel Barraccliffe, Consultant
- Michelle Erickson, Consultant
- Bill Hyder
- Patrick LeCuyer
- Larry Merkley, Lead
- Janine Roeth
- Terry Schalk
- SHR and other campus sub-team members TBD

**Project Goals/Objectives:**

1. Create new IT Organization Structure
   - Develop philosophy—how to build the organization
   - Create straw models based on best practices and driven by philosophy
   - Understand components of organization (e.g., what are services, functions)

2. Oversee establishment of roles & responsibilities for all levels of new organization

3. Develop fair and rational process(es) to fill positions of new organization
   - Establish principles and values
   - Develop criteria to determine IT positions that will not be “in” the new organization (e.g., considered too specialized)

4. Conduct needs assessment and create appropriate training program to support new organization

5. Address Change Management / Employee Relations issues

6. Communicate information about organizational structure and associated processes, including liaison with union(s) as appropriate

**Project Deliverables:**

1. Recommended organization structure to ITTP Steering
2. Presentation to EBC of recommended organization structure
3. Transition plan to move employees to new organization

   - Organization Structure, including recommended governance model
   - Classified jobs

For more info, please see: [its.ucsc.edu](http://its.ucsc.edu)
- Process to fill jobs
- Competency gap analysis
- Training (retraining) Identification
- Change management

**Major Project Interdependencies:**
- Role descriptions from teams: Client Relationship Management; Server Resource Management; Security Administration; Enterprise Applications, Architecture and Standards; Workstation Support; Web Publishing
- Communications Team
- Culture, Values, Symbols
- IT Funding Model
7 Document Information and Revision History.

<table>
<thead>
<tr>
<th>File Name</th>
<th>IT Transformation Program Charter</th>
</tr>
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<tbody>
<tr>
<td>Original Author(s)</td>
<td>Mel Barracliffe</td>
</tr>
<tr>
<td>Current Revision Author(s)</td>
<td>Larry Merkley, ITS Advisory Committee (Pat LeCuyer, Terry Schalk, Bill Hyder), Mel Barracliffe, Scott Morris.</td>
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<tr>
<th>Version</th>
<th>Date</th>
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<tbody>
<tr>
<td>1.0</td>
<td>12/14/03</td>
<td>Mel Barracliffe</td>
<td>Draft document content outline and template created for working session with Larry Merkley and the ITS Advisory Committee.</td>
</tr>
<tr>
<td>1.1</td>
<td>12/17/04</td>
<td>Larry Merkley, ITS Advisory Committee, Mel Barracliffe, Scott Morris.</td>
<td>Updated during working session.</td>
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<tr>
<td>2.0</td>
<td>01/07/04</td>
<td>Mel Barracliffe</td>
<td>Document cleanup and edits. Eliminated IT Transformation Planning as a project. Combined IT Governance and IT Portfolio Management. Added Backup and Archive as a project. Drafted additional initial project definitions.</td>
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<tr>
<td>2.1</td>
<td>01/14/04</td>
<td>Larry Merkley, ITS Advisory Committee, Mel Barracliffe, Scott Morris.</td>
<td>Updates applied from January 12 work session.</td>
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<tr>
<td>2.2</td>
<td>1/16/04</td>
<td>Larry Merkley, Pat LeCuyer, Mel Barracliffe.</td>
<td>Incorporated latest edits after review to assign IT SD and IT DC team members across projects.</td>
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<td>2.3</td>
<td>1/22/04</td>
<td>Larry Merkley, Mel Barracliffe.</td>
<td>Updated team member assignments, removed projects that will not be launched in January. Document name changed to IT Transformation Program: Project Descriptions.</td>
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<td>2.4</td>
<td>1/27/04</td>
<td>Mel Barracliffe</td>
<td>Changes in team member names.</td>
</tr>
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<td>2.5</td>
<td>2/10/04</td>
<td>Mel Barracliffe</td>
<td>Updated with individual team updates after launch session January 27-28, 2004. Project description template revised to clearly show the goals, objectives, and deliverables. Section on General Project Deliverables added. Section on Program Milestones added. Document name changed from “IT Transformation Program Project Descriptions V2.5” to “IT Transformation Program (ITTP) Program Charter V2.5.”</td>
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<td>2.6</td>
<td>2/17/04</td>
<td>Mel Barracliffe</td>
<td>Edits from ITTP Project Managers.</td>
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<td>2.7</td>
<td>2/24/04</td>
<td>Mel Barracliffe</td>
<td>Revised/Added Program Deliverables and Milestones.</td>
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<td>2.8</td>
<td>2/27/04</td>
<td>Mel Barracliffe</td>
<td>Added Communications Project and edits from ITTP Project Managers. Updated program structure diagram to include Transformation Executive Committee, Communications team and Change Management Committee.</td>
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<td>2.9</td>
<td>4/15/04</td>
<td>Janine Roeth</td>
<td>Updated the Project Descriptions with current members, goals, deliverables. Added Organizational Design Team info.</td>
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