Welcome!

Expanded Unit Representative Meeting

September 23, 2013
Today’s Agenda

● Why IT Shared Services?
● What are the new Shared Services?
● Rollout process & schedule
● Workforce strategy & timeline
● Financial overview
● Employee support & engagement
● Next Steps
Resources to Support Your Unit

Contains detailed materials to support decision-making process

Look for the binder icon throughout presentation for more details

Extra copies available
WHY IT SHARED SERVICES?

Laura Patterson
CIO and AVP, Information and Technology Services
Note: These counts represent the cumulative number of services delivered by all providers across the university.

1 Source: “IT Rationalization Project Approach and Preliminary Findings - Accenture Presentation to Provost and CFO”, 6/21/2010
The IT Strategy

NextGen Michigan

Unit Products and Services
Shared Products and Services

Shared Infrastructure

Rationalize IT Across Campus

Organizational Structure
Alignment and Culture
Governance
NEW SHARED SERVICES & ROLLOUT ACTIVITIES

Tim Kelly
Project Director for MiWorkspace
IT Shared Services

Projects

- End-User Computing
- Network
- Storage
- Security
- Server

Implementation

- Leadership Engagement & Workforce
- Technology & Implementation
- Communications
- Training

New Services

Mi Workspace
Mi Server
Mi Database
Information Assurance Services

Overview of ITS Shared Services - ITS Shared Services
Support Model

Tiered Support

Defined

Customized

Foundational Technology & Services
Unit Rollout Activities: Unit Leadership

- ITS & Units partner to build a team to work together to:
  - Accommodate unique unit needs
  - Work within appropriate business cycles
  - Manage risks
  - Make the best possible decisions for administrators, researchers, faculty, staff, and students

- The Unit Leadership Roles include:
Unit Rollout Activities: Implementation Process

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Activity</th>
<th>Hours/Weeks/Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>-14 to -11 Weeks</td>
<td>Leadership Engagement</td>
<td>~15 hours over 3 months for Unit leaders</td>
</tr>
<tr>
<td>-9 to -6 Weeks</td>
<td>Communications</td>
<td>~10 hours over 10 weeks for Unit Communications Lead</td>
</tr>
<tr>
<td>-5 Weeks to Rollout</td>
<td>Discovery</td>
<td>~40-50 hours over 4 weeks for Unit IT staff</td>
</tr>
<tr>
<td>Rollout</td>
<td>Detailed Planning</td>
<td>~10 hours over 5 weeks for Unit IT Staff</td>
</tr>
<tr>
<td>4 to 6 Weeks Post Rollout</td>
<td>Rollout</td>
<td>&lt;1 hour of “Day One” activity for each transitioning employee</td>
</tr>
<tr>
<td></td>
<td>Stabilization</td>
<td>~5 hours over 4-6 weeks for Unit Leaders + limited time for Unit IT staff</td>
</tr>
</tbody>
</table>

Unit Discovery & Detailed Planning Activities Matrix - Rollout Approach
## Unit Rollout Activities: Faculty & Staff Experience

<table>
<thead>
<tr>
<th>12 to 10 Weeks Prior</th>
<th>8 to 6 Weeks Prior</th>
<th>1 Week Prior</th>
<th>1 Day Prior</th>
<th>Day One</th>
</tr>
</thead>
</table>
| Begin to receive unit specific Web and email content | Receive email reminders to:  
- Run discovery tool  
- Sync passwords  
- Confirm data locations  
- Identify sensitive data | Receive “one week until your transition” reminder email | Receive “day before your transition” reminder email | Receive support in multiple forms:  
- Email/video  
- “Quick start” guide on desk  
- In-person visits |

### Communications, Rollout, & Stabilization Activities - Rollout Approach
# Draft Rollout Schedule

<table>
<thead>
<tr>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug</td>
<td>Sep</td>
<td>Oct</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pilot &amp; LSA Rollouts</td>
<td>Wave 1 Rollouts</td>
<td>Wave 2 Rollouts</td>
</tr>
<tr>
<td>LSA Regular Rollout</td>
<td>LSI</td>
<td>SW</td>
</tr>
<tr>
<td>Pilot 1 LSA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pilot 2 SOE</td>
<td>LSA Regular Rollout Continued</td>
<td>Engineering</td>
</tr>
<tr>
<td>Pilot 3 TBD</td>
<td>Dent</td>
<td>Law</td>
</tr>
</tbody>
</table>

Tentative MiWorkspace Academics & Research Roadmap - Front Pocket

DRAFT Schedule
WORKFORCE STRATEGY & TIMELINE

Karen Sloan
Director of HR for ITS & Workforce Strategy Lead, NextGen Program Office
Workforce Transition Process

Small groups of units will be divided into three “waves” of workforce activities. Each wave will include:

- **Kick off session with Unit Reps** to provide technical, financial, and workforce details
- **Unit and ITS discussions** to come to decisions about who will move to ITS and who will remain in unit
- **Deadline for final workforce decisions**
- **Unit manager/employee meetings** to inform employees about decisions, answer questions & provide additional details
Guiding Principles for Workforce Transition

1. Retain staff members, regardless of unit affiliation, who are high performers and possess the skills, knowledge, and ability to perform the available work, in both shared service providers and units.
2. Build the knowledge, skill, abilities, and personal effectiveness of IT professionals across campus to support the U-M IT goals.
3. Engage Program, Academic, and Administrative leadership in a collaborative process for defining approach, executing the transition process, and making transition decisions.
4. Implement workforce plans that ensure appropriate staffing.
5. Encourage high potential/high performing staff, irrespective of current unit/department, to apply for open positions at U-M.
Many unit staff perform activities that are not covered by the new services. For these cases, a rule of thumb was developed to guide decision making.

- Does a position move?
- Does a person move?
- How are remaining activities covered?
Workforce Waves

2013 2014 2015

Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug Sep

Pilot & LSA Rollouts Wave 1 Rollouts Wave 2 Rollouts Wave 3 Rollouts

Pilot 1 LSA LSA Regular Rollout LSI SW SOI Public Health KIN Ross PP

Pilot 2 SOE LSA Regular Rollout Continued Engineering SN RE Music

Pilot 3 TBD Dent Law Stamps Nursing Taubman Pharmacy

Workforce Activities for Pilot Wave 1 workforce Wave 2 workforce Wave 3 workforce

Tentative MiWorkspace Academics & Research Roadmap - Front Pocket

DRAFT Schedule
## Workforce Waves + AST

### 2013
- **Aug**: Pilot & LSA Rollouts
- **Sep**: Pilot 1 LSA
- **Oct**: Pilot 2 SOE
- **Nov**: Pilot 3 TBD
- **Dec**: AST Transition meetings

### 2014
- **Jan**: FIN Go-live
- **Feb**: HR Go-live
- **Mar**: Pilot 3 TBD
- **Apr**: FIN/HR Go-live
- **May**: FINGo-live
- **Jun**: HR Go-live
- **Jul**: Pilot 2 SOE
- **Aug**: Pilot 3 TBD
- **Sep**: Tentative MiWorkspace Academics & Research Roadmap - Front Pocket
- **Oct**: Pilot 2 SOE
- **Nov**: Pilot 3 TBD
- **Dec**: FIN Go-live

### 2015
- **Jan**: LSA Regular Rollout
- **Feb**: LSA Regular Rollout Continued
- **Mar**: Engineering
- **Apr**: Engineering
- **May**: Engineering
- **Jun**: Engineering
- **Jul**: Engineering
- **Aug**: Engineering
- **Sep**: Engineering
- **Oct**: Engineering
- **Nov**: Engineering
- **Dec**: Engineering

### Workforce Activities for Pilot
- **2013**: Pilot & LSA Rollouts
- **2014**: Wave 1 Rollouts
- **2015**: Wave 2 Rollouts

### AST Workforce Transition meetings
- **2013**: Pilot 1 LSA
- **2014**: LSA Regular Rollout
- **2015**: LSI, SW, SOI, Public Health, KIN, Ross, PP

### Tentative MiWorkspace Academics & Research Roadmap - Front Pocket
- **DRAFT Schedule**
FINANCIAL TRANSITION

Jeff Kennedy
Executive Director of ITS Finance
Academic & Research - Transition Process

- ITS will take on expense of transferred staff
- Units will keep budget
- ITS will bill units for services
- Units retain savings over time
Rate Projections

- MiWorkspace billings will be based on a rate per person in your unit
  - Headcount data obtained from Provost’s Office based upon Human Capital Report
    - NOTE: ITS to clarify with Provost’s Office how headcount is calculated and discuss with units as part of leadership engagement
  - Cost of devices remains responsibility of Unit

- MiWorkspace Rate projections
  - Original projections were $1000/year/headcount for FY14
  - Rates are projected to decrease in subsequent years as efficiencies are achieved
  - Targeted rate at maturity is between $800 and $900
  - Updated projections are under review
  - Unit by unit impact is TBD
EMPLOYEE ENGAGEMENT & SUPPORT

Amy Peters
Change Management Lead,
NextGen Michigan Program Office
Employee Engagement Goals

• Minimize employee unease about the changes
• Connect transitioning employees with future teams
• Open lines of communication
Employee Transition: ITS Town Hall

Goals:
- Provide context
- Describe services, transition timeline, and activities
- Answer questions

<table>
<thead>
<tr>
<th>Activity</th>
<th>Pilot</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees Notified by Units</td>
<td>Varies</td>
<td>2/17/14</td>
<td>6/16/14</td>
<td>12/8/14</td>
</tr>
<tr>
<td>ITS Sends Town Hall Invite</td>
<td>Varies</td>
<td>2/21/14</td>
<td>6/20/14</td>
<td>12/12/14</td>
</tr>
<tr>
<td>Host Town Hall &amp; Town Hall Debriefs</td>
<td>Varies</td>
<td>2/23/14</td>
<td>6/24/14</td>
<td>12/15/14</td>
</tr>
</tbody>
</table>
Requests for Units: Flexibility & Inclusion

• Enable employees to retain ties to the units they serve, as appropriate
  o Maintain on communications/listservs
  o Include in unit meetings
  o Include in activities, recognition, or team events

• Encourage employees to attend town hall and engagement events (2-3 hours/month)
  o Communicate HR issues, concerns, questions to ITS
Transition Activities
During Unit Implementation

<table>
<thead>
<tr>
<th>3 Months</th>
<th>2 Months</th>
<th>1 Month</th>
<th>Rollout</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit &amp; ITS HR begin transition activity</td>
<td></td>
<td></td>
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<tr>
<td>ITS extends Transfer Offer Letters</td>
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<tr>
<td>Future supervisors reach out to employees</td>
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<tr>
<td>Transitioning employees participate in technical discovery and detailed planning</td>
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<tr>
<td>Transitioning Employees become ITS Staff Members and begin technology training</td>
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</tr>
<tr>
<td>Employee Accepts/Declines Transfer Offer</td>
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**Employee Transition Timeline - Workforce Transition Materials**
Employee Training to Support New Roles

ITS is committed to ensuring that transitioning employees have the training resources to be successful in their new roles.

- All new ITS staff members
- Neighborhood IT staff members
- Network, storage, server administration, security, or service desk staff members
Suggested Content for IT Employees

- Presentations, videos, PDFs, interviews
- FAQ
- Detailed Web content, newsletters, and transition information

its.umich.edu/shared-services
Actions & Next Steps

1. Provide your HR contact's name & email address before you leave

2. Review schedule & respond with concerns

3. Review information in binder & ask questions

4. Use materials to begin to share info within your unit:
   a. IT staff
   b. Also share with communications, HR, finance, key leadership in your unit
Questions?

Please contact:
NextGen Michigan Program Office
734-647-7442