Welcome!

Expanded Unit Representative Meeting

September 24, 2012
Today's Agenda

- Why Shared IT Services?
- What are the Shared IT Service offerings?
- Decisions, process & timeline
- HR & Financial Materials
- Employee support & engagement
- Additional resources
Resources to Support Your Unit

Contains detailed materials to support decision-making process

Extra copies available

Look for the binder icon throughout presentation for more details
Resources to Support Your Unit

Non-sensitive information also available online

Click on:
"For Unit Leadership"
(the page will be published after this meeting)

miworkspace.it.umich.edu/learn
Who's included?

- ITS
- UHR
- Finance/Risk Management
- Audits
- Investment Office
- Development
- Alumni
- University Musical Society
- Athletics
- Rackham
- Student Affairs
- Academic Affairs
- Fleming
- Office of Student Publications
- OVPR units
- Facilities and Operations
- Cultural Collections (Clements, Bentley, Museum of Art, Matthei, Nichols)
- ICLE

Units, Unit Representatives, & Rollout Schedule - Rollout Schedule & Approach
Why Shared IT Services?

John Gohsman
Executive Director of Strategy, Planning, and Solutions
A starting point...

Note: These counts represent the cumulative number of services delivered by all providers across the university.

IT Rationalization Goals

- **Improve** IT service quality
- **Reduce cost** and improve transparency
- **Repair** the university’s fractured infrastructure
University Business Case

$127M = Estimated savings to U-M's bottom line over 10 years

$25M = Estimated annual savings from IT Rationalization

$13.5M = Estimated annual savings from MiWorkspace, MiServer/MiDatabase, and IT Security Services ($4.1 is cost avoidance)

$2.1M = Estimated annual labor savings from Central Admin Rollout
What are the Shared IT Services?

Tim Kelly
Project Director for MiWorkspace
Projects

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

Shared IT Services Implementation Effort

New Services

Projects

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

Shared IT Services Implementation Effort

- MiWorkspace
- MiServer
- MiDatabase

IT Security Services
What is: MiWorkspace

MiWorkspace, a suite of desktop services we use every day, including printing, network connectivity, storage, security, software, and desktop support.
MiServer and MiDatabase, two new services that provide virtual servers with managed operating systems or databases. Both services include Service Center support, and features such as monitoring, patching, and backup and recovery.
What are: IT Security Services

IT Security Essential, which is a campus-wide IT solution to increase security and regulatory compliance, and toll security services, which support a unit's specific IT security needs.
Decisions, Process & Timeline

John Gohsman
Executive Director of Strategy, Planning, and Solutions
Unit Decision Process & Timeline

Sept. 24 - Nov. 2: ITS & Units partner to finalize employee recommendations

By Oct. 15: Check-in with John to address questions, escalate requests to retain employees and/or funding

Nov. 2: Finalize workforce decisions
Rollout Timeline

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<td>Build</td>
<td>Deploy to CENTRAL ADMINISTRATION</td>
<td>Deploy to CAMPUS (Academic &amp; Classrooms)</td>
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<td>Pilots</td>
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Rollout Activity
(Average Unit)

Limited Preliminary Work

Three Months Significant Engagement Between Unit & ITS

Limited Stabilization Work

Discovery, Detailed Planning, & Roll Out

- Leadership engagement
- Workforce activities:
  - Offer letters & acceptances
  - HR paperwork
- Communications planning & Web customizations

- Technical Discovery
- Training for new IT staff
- Phased communications:
  - General awareness
  - Targeted outreach
  - Transition count-down
- Rollout
- Post-transition visits

- Individual customizations
- Address remaining issues

High Level Summary of Rollout Approach - Rollout Schedule & Approach
Rollout Calendar

Implementation Team 1
Finance & Audit (Pilot 3)
Division of Student Affairs
- Separate Roll-outs for:
  - Unions/Career Center (Apr)
  - Health Services (May)
  - Housing (Jun)
Facilities & Operations

Implementation Team 2
Alumni Association Development
OVPR Groups supported by OTT
Academics Affairs (non-academic units)
Fleming, OVPR in Fleming, Student Publications
Cultural Collections
(Clements, Bentley, Museum of Art, Nichols, Matthai)

Implementation Team 3
Rackham
Athletics
(Assist with F&O or Academic/Research unit)

Implementation Team 4
Academic/Research (Pilot)

Central Administration Rollout Calendar - Rollout Schedule & Approach
HR & Financial Data

Karen Sloan
Director of HR for ITS & Workforce Strategy Lead for the NextGen Program Office

Jeff Kennedy
Interim Executive Director of ITS Finance
Unit-Specific Human Resources Materials

- Employee data
  - 2009/10
  - 2012
- How to interpret the data?
- What is the anticipated employee and/or funding commitment for your unit?
- Why do some units not have HR data?
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.
Some unit staff may perform activities in their unit 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?
Employee Discussions

Sept. 24 - Nov. 2: ITS & Units partner to finalize employee recommendations

Week of Sept. 24: Unit hosts IT Employee presentation

By Oct. 15: Check-in with John to address questions, escalate requests to retain employees and/or funding

Nov. 2: Finalize workforce decisions

Week of Nov. 5: Unit hosts manager/employee meetings

Shared IT Services for IT Employees Presentation - Workforce Transition Materials
Manager/Employee Speaking Points - Workforce Transition Materials
Shared IT Services for Employees - Overview & FAQ - Binder Inserts
Unit-Specific Financial Materials

- Financial data
- How to interpret the data?
- What is the anticipated financial impact for your unit?
- Why do some units not have financial data and what does this mean?
Employee Support & Engagement

Amy Peters
Change Management Lead,
NextGen Michigan Program Office
Employee Discussions

ITS Timeline & Process

- **Friday, November 9** - ITS sends invitation to town hall sessions
- **Weeks of November 12 & 19** - ITS hosts town hall sessions
Employee Engagement
Ongoing Activities


Goals:
- Minimize employee unease about the changes
- Connect transitioning employees with future teams
- Open lines of communications
Request for Unit Flexibility & Inclusion

● Request for inclusion
  Employees need to retain ties to the units they serve, as appropriate
  ○ Maintain on communications/listservs
  ○ Include in unit meetings
  ○ Include in activities, recognition, or team events

● Request for flexibility
  ○ Encourage employees to attend town hall and engagement events (2-4 hours/month)
  ○ Communicate emergent HR issues, concerns, questions to ITS
# Employee Activities During Unit Implementation

<table>
<thead>
<tr>
<th>4 Months</th>
<th>3 Months</th>
<th>2 Months</th>
<th>1 Month</th>
<th>Roll Out</th>
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<td>Unit and ITS HR begin transition activity</td>
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<td>Transitioning Employees participate in technical discovery and detailed planning, and begin training</td>
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<td>ITS extends Transfer Offer Letters</td>
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<td>Future supervisors reach out to employees</td>
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<td>Transitioning Employees become ITS Staff</td>
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<td>Employees Accept/Decline Transfer Offers</td>
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**High Level Summary of Rollout Approach - Rollout Schedule & Approach**
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
Supporting Materials

This presentation
Manager/Employee Speaking Points
IT employee "Meeting in a Box"
FAQs
...and more online!
Recap: Action Items

1. Give us your HR contact's name & email address before you leave
2. Review information in binder & ask questions
3. Use meeting in a box to share info this week:
   a. IT staff
   b. Also share with Communications, HR, Finance, key leadership in your unit
4. Contact John by 10/15 to schedule a check-in
5. Facilitate workforce decisions by 11/2
Any questions?

Contact:
John Gohsman
NextGen Michigan Program
734-647-7442