

Organize for Success

(October 2012 – November 2013)

**WATERLOO
INFORMATION SYSTEMS
& TECHNOLOGY**

ist.uwaterloo.ca

Project Closure Update

November 22, 2013

Project Team

Executive Sponsor	Dave Wallace, CIO
IST Project Lead	Bob Hicks, Director, Client Services
IST Steering Committee	Dave Wallace, Bruce Campbell, Andrea Chappell, Melissa Conrad, Bob Hicks, Dave Kibble, Jason Testart, Martin Timmerman
Consulting Team	Bernstein Consulting/Litcom: Walter Tora, David Polsky, Steve Litwin, Malcolm Bernstein
Project Contributors	IST Staff, IST Communication Officer, University Committee on Information Systems and Technology (UCIST), Computing Technology and Services Committee (CTSC), IT Strategic Plan Task Force, Human Resources, Staff Association.

Project Objectives

based on what was learned in consultations

- Align Information Systems and Technology (IST) organization design with the campus-wide IT Strategic Plan (hence the name 'Organize for Success').
- Engage key stakeholders in broad consultations, and foster a sense of partnership.
- Review of existing services and processes in IST.
- Best practices analysis and comparison of other universities and their IT organizations. This was supported by research from Gartner and other sources.
- Communications plan and a series of staff and campus information sessions to provide progress reports on the project.

More Objectives...

- Create a Client Representative role to provide an access point for services, new project planning, escalations, advice and guidance.
- Common set of services with tailored service level agreements (SLAs) required.
- Create a usability team and renovate core systems in terms of user experience
- Create a Project Management Office.
- Deploy a knowledge base and incent employees to contribute content.

Project Outcomes

- Two new IST groups were created, Enterprise Architecture and Portfolio Management. Colin Bell is the new Director of Enterprise Architecture. Dave Kibble is the Director of Portfolio Management.
- A newly organized Enterprise Systems group with a new Director, Tim Barnett.
- A newly organized Technology Integrated Services group, combining Networks and Computing Systems Services.
- An enhanced Information Security Services group which now includes Identity and Access Management (IAM) staff that used to work in Information Systems.
- A new management team in all the IST groups, to help with strategy, services, client service, and staff development and to address span of control and succession planning issues.
- All “net new” immediate positions have been filled. IST executive reviewed priority of next “net new” positions on November 11, 2013.

More Project Outcomes...

- 10 of the 12 “Expression of Interest” positions have been filled. Manager, Enterprise Systems – Development (ERP) is in progress. Manager, Enterprise Systems – Support Services, is being reposted as an Expression of Interest, to IST only.
- 61 of 163 IST staff had no change in their jobs. 74 staff had a change in supervisor only (role identical), and 28 staff were mapped in on incumbency (at least 60% incumbency level).
- Presentations to the Staff Relations Committee (SRC) and Executive Committee.

Lessons Learned

- Meetings with Staff Association representatives and further receiving of input from meetings they held with staff was key.
- Ensure regular communication with staff and provide ample opportunities for feedback during the process.
- Ensure to engage key stakeholders (faculty, staff and students) early in broad consultations, and foster a sense of partnership.
- Engagement from Human Relations/Staff Relations early in the process was very important.
- Talk to others who have done a re-org - lessons learned from CECA's reorganization and other universities were very helpful.

Transition to Operations

- Successful candidates for ‘net new’ and ‘expression of interest’ positions moved to their new roles on November 1st, 2013.
- Vacant positions resulting from ‘net new’ hires will be posted campus-wide before end of year 2013.
- IST executive prioritized next phase of ‘net new’ hires on November 11, 2013.

Work Underway...

- IST will continue to refine and evolve the organization based on client needs and opportunities with the federated model. This will include reviewing IST career paths.
- IST will continue to inform IST staff about new roles in the two new IST groups, Enterprise Architecture and Portfolio Management. This will help staff understand and develop workflow in IST.
- Training to be provided to the new management team. Training will be organized by Organizational and Human Development (OHD). An initial session planning session is scheduled for December 16th, 2013 to help the new IST management team identify skills they need to be successful in their new roles.
- Two Expression of Interest positions to be filled: Manager, Enterprise Systems – Development (ERP) is in progress. Manager, Enterprise Systems – Support Services, is being reposted as an Expression of Interest, to IST.

A View Forward...

Several projects have either started or will be started soon that will benefit from IST's new organization design. These include:

- Create Service Level Agreements (SLA) with stakeholders: faculties, academic support departments, Library. Also, create SLA for IST core services.
- Implement a new request tracking system. Benefits include creation of a knowledge base, usability, and metrics.
- Implement an asset management system.
- Implement IT best practices.

Post Project Tasks

- Net New positions (6 month, 12 months, 18 months) have been prioritized and will be filled, as approved.
- Career Path session with Human Resources was held on November 7th so that staff have the latest and most up-to-date understanding of the process to grow their careers. Current career path documents in IST need to be reviewed and updated.
- IST will lose experienced staff to retirement. The new IST organization design provides opportunities to do succession planning. While IST will lose experienced staff, there will be opportunities for existing staff to fill retiring staff roles (the normal “churn”).
- The Expression of Interest (EOI) process provided an opportunity for staff to let IST executive know they are interested in other career opportunities. The IST management team will be encouraging professional development opportunities in management skills for not only the successful EOI applicants but also for all applicants.

Project Closure Communication

The following presentations were held:

- IST Staff Presentation held on October 16, 2013
- Open House Presentation for Campus Community held on October 17, 2013
- Presentation of this report to UCIST on Friday November 22, 2013
- Presentation of this report to CTSC on Thursday November 14, 2013
- Presentation to UW Leadership Forum on Thursday November 14, 2013
- Communication in Daily Bulletin
- New IST webspace to launch at the end of November 2013. New focus on service catalogue.

Thank You!

(...and happy to take questions)

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