# Service Level Agreement Project
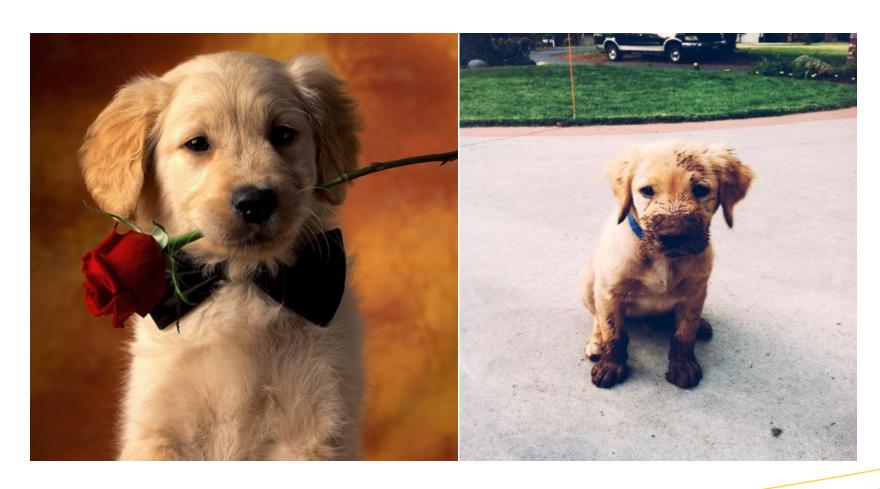


Presented By:

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IST

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# 50 SLA Meetings in Spring 2014

# SLA Project Objectives

- Document current verbal agreements between IST, academic support departments and the faculties.  Many verbal agreements have been made over the years, often by people who have left the university. And, there will be a lot of retirements in the next 5 years!

- Look for opportunities to improve service by better defining and prioritizing key services required to meet client business requirements.

- Ensure clients know who their IST account rep is, and what their role is.

- Provide the opportunity to review IST's ability to meet expectations, and make changes if necessary.

- Provide the opportunity for clients to examine their requirements for key services, and document the gaps between current service and desired service.

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# Service Level Agreement Project Team

| Executive Sponsor | Dave Wallace, CIO<br>IST Executive |
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| **IST Project Lead** | Bob Hicks, Director, Client Services |
| **Project Contributors** | Bill Baer, Client Services<br>Lisa Tomalty, Manager, Client Services.<br>Bruce Campbell, Director, Technology Integrated Services<br>Greg Smith, Manager, Enterprise Systems<br>Wayne Oldford, Associate Dean of Computing, Faculty of Math.<br>Ellen Rethore, Associate Vice-President, Marketing and Strategic Communication<br>IST Client Services Account Representatives<br>**SLA meeting participants** |

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# Service Level Agreement Project Outcomes

1.  Meetings held with 37 academic support departments and 6 faculties during the Spring 2014 term. The meetings provided an opportunity to learn more about each area, about their business, their IT requirements, concerns, and challenges. Just having face-to-face conversations in the client areas being discussed was in itself a valuable opportunity to tour areas, and learn about challenges.

2.  SLA or Memorandum of Agreement document created for each area. These documents are transparent, meaning they are accessible for the campus to view on the SharePoint site http://sharepoint.uwaterloo.ca/sites/sla. The documents are living documents, meaning they can be changed as needed.

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# Outcomes

3. Document the current IT environment in each area, in each SLA. This will be useful in the future to help determine account representative skills needed in each area, if and when an account representative change is needed.

4. Review the reporting procedure for IT issues. For example, who are the points of contact for faculty/staff needing help with IT, and for issues involving IST services. The IST account rep is the contact person if previous connections haven't already been made.

# Outcomes

5. Creation of a Service Level Expectations (SLE) – IST Technology Integrated Services document to define core services available, availability and uptime, notification of incidents and maintenance, response times, escalation, and more.

6. Creation of Service Level Expectations (SLE) – IST Enterprise Systems document to define core services, governance, availability and uptime, notifications and incidents, response times, requesting support, response time, and more.

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# Outcomes

7. Review and document possible roles of IST account representatives. Not all the account representatives do the same thing, as some functions have been tailored to meet the needs of the area being supported. Any account rep changes must be approved by department/Faculty.

8. A small number of account representative changes were made to better position skills and client needs. A standard SLA was created for smaller academic support departments (fewer than 3 staff), and the IST point of contact for these departments is the CHIP.

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# Outcomes

9. IST now has a list of gaps between current service and desired level of service. The gaps can be categorized as things that can be done in the short term with no new resources, and things that will require more resources to provide, which usually means longer term.

10. Overall, the feeling was IST was doing a good job providing client services, and providing other IT services. Is there a desire for more…yes.

# Lessons Learned (Gaps)

1. Review the Desktop Rollover Program. The program is 9 years old, and hasn't been reviewed in that time. Is there opportunity to make changes such as expand it to include contract staff, cover more of the costs for laptops, review which departments are included?

2. Improved laptop/tablet Support, including purchasing advice, and help with laptop/tablet management (imaging, encryption, patching, asset management). Advice for optimal laptop usage procedures is also needed (e.g. backup, remote desktop, etc).

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# Lessons Learned (Gaps)

3. Open a new service desk in Needles Hall. This services desk needs to be open during the day as well as evenings and weekends. Extended hours support is needed for AccessAbility Services. Support would include workstation support, as well as support for meeting rooms (e.g. projection, videoconferencing).

4. Completion of Operational Level Agreements (OLA) for enterprise systems and some other services, especially those that require ongoing IST development. The OLAs would document expectations.

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# Lessons Learned (Gaps)

5. Business analysis support. Departments would like to request a review of their IT processes, to determine if there are opportunities to improve. An example is to review the best way to share files. Some departments use the R-drive, some use SharePoint, and some use other solutions. Can SharePoint be utilized more, for example, using workflows in the department to streamline process and reduce paperwork? The short answer is yes.

6. Improve process to close requests (e.g. before closing, check with client to ensure issue was indeed resolved). This is being reviewed in the IT Best Practice and RT4 implementation projects. It is part of the ITIL model.

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# Lessons Learned (Gaps)

7. Expand the web based training service (Lynda.com) so that there isn't a waiting list. A Lynda.com site license for staff, faculty and grad students was proposed to Ian Orchard, and it has been accepted. Work is now underway to implement, and hope to launch and announce on Tuesday November 4th, 2014.

8. Account representative changes were made to better align skills with needs in some academic support departments. Other changes were made to improve service. This included implementing a standard schedule for account representatives in the faculties (Monday through Thursday in the faculty). It was also noted that it is important for the IST account representatives to not lose touch with IST. Fridays will be used for IST meetings and professional development opportunities in the BlackBerry building.

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# Lessons Learned (Gaps)

9.  Many academic support departments stressed the need for software to manage their customers.  Sometimes sharing information about customers with other departments/faculties can be beneficial.

10. Local IT support in some departments is currently being done by staff on contract. If these contracts are not renewed, departments would be looking to IST to pick up the support. This is documented as a concern for now.

# Remaining Tasks

- The SLAs and MoUs are living documents. They will be updated as needed by the IST account representatives in collaboration with their respective support areas. All the SLAs need another review.

- Acquire electronic signatures on the SLA and MoU documents. This will occur during the Fall 2014 term. The signatures signify that a meeting has been held, and to acknowledge awareness of the SLA/MoU.

- Presentations to IST Management, CTSC, UCIST, UW Leadership Forum, WatITis.

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# Questions