



Workgroup Methodology

The Process

Each workgroup will follow a defined process to develop a recommendation for the creation of a shared service. The CIO will provide each group with a baseline charter. The charter provides the workgroup with boundaries to shape discussion, investigation and the recommendation. After review, workgroups may request changes to the charter from the CIO.

Each workgroup will be chaired by a member of the campus IT community selected by the CIO. Additional subject matter experts will be invited to participate as core members of the team. Other members of the campus IT community may request to be included in the workgroup by contacting the chair.

Workgroups will post their work online and invite the campus IT community for feedback at least three times through the development of the recommendation. Comment from the university community will be solicited after the workgroup has submitted a draft recommendation.

The workgroup's completed recommendation will be forwarded to existing technical teams impacted by the recommendation. These teams will prepare responses to the recommendation and will forward both the workgroup recommendation and the technology team response to the CIO.

At the discretion of the CIO, the recommendation may be accepted, submitted to IT governance for further review and discussion, or returned to the workgroup for refinement.

Workgroup Task List for Completing the Process

Workgroups will track progress and access resources in a designated SharePoint site. When items on the task list are marked completed on the workgroup's SharePoint site, progress will be communicated publicly on the Campus IT website.

1. Review charter and methodology documents
2. Work through recommendation development questions
3. First "one team" review
4. Second "one team" review
5. Third "one team" review
6. Draft final recommendation
7. Technical team review
8. Campuswide review

The Recommendation

The workgroup's final recommendation will include all details necessary to form a shared service team to deliver services under the workgroup charter, including characteristics of the service and principles for operations. The recommendation will not specify tools or technologies, but will instead specify processes for selecting tools and technologies. The recommendation will address the following eight sections.

1. Design

- What is the business rationale for the shared service?
- What functions or services are included in this shared service?
- What are the requirements and specifications for this shared service?
- How do our peers deliver these services (organizational structure, governance, finances, policy, technical requirements, standards, etc.)
- What form of agreement (SLA, MOU, OLA, ALA, etc.) should be developed?
- What industry standards and best practices must this shared service follow?
- What dependencies exist with other shared services or with other technical teams at the university? How should those dependencies be resolved?

2. Staffing

- How should the service be staffed? How many FTE (permanent & hourly/student) are needed?
- What staffing roles are needed for this shared service?
- What is the expected level of expertise (KSAs) of anyone who is a member of the team?
- What other knowledge, skills and experiences are required for members of the team?
- What are the expectations for professional training and development?
- What types of education or certifications are expected of team members?
- What career paths are presented within this shared service?
- To what degree can student employees participate in this service?
- How can the service be used as a training grounds for students?

3. Governance

- What form of oversight should this service have? Advisory/oversight board, manager, CIO, etc.
- What input should the university community have on the design of service offerings?
- What sorts of policies need to be put into place to support this shared service?
- How would this service fit within a change management framework?
- What would the implementation roadmap look like?
- How will operational readiness be determined?

4. Metrics & Performance

- What are the measures of success for this shared service?
- What other measures are important to track?
- How is capacity and performance measured?
- What service level milestones should be adopted?

5. Support

- How is this shared service supported? Where would support be offered?
- How would this service integrate with an incident management framework?
- How do consumers of the service interact with the team for support?
- What forms and what types of communication are necessary for this service?
- How will information be accessible to consumers of this service?
- How does support for this service integrate with other support functions of campus IT?
- What kinds of training, if any, will be required for consumers of this service?

6. Financial

- What is the anticipated annual cost of operations for this service?
- What are the anticipated cyclical costs of technology deployed by this service?
- What are the per unit costs for delivering service?

7. Technology

- What characteristics must be considered for deployed technologies?
- What process must be used to determine solutions acceptable by faculty, students, and staff?
- What standards and best practices must guide technology selection?
- How will lifecycles of technology be determined?

8. Exceptions

- What edge-cases must be considered?
- How will edge-cases be supported?

Last Revision

Version: 19

Date: 11/18/2015 9:15 AM

User: Chris Alan McCoy