UCOP CHANGE ROADMAP

Mission
Why do we exist?
Who are we?
What are our goals and aspirations?
Who are our customers?
How are we unique?
How will we excel?

Strategic Analysis
What work do we perform and for whom?
What work do our customers/stakeholders require us to complete (strategic, tactical, communication, planning, monitoring)?

Strategic Goals
High Level Design
What do we need?
What skill set is needed?

Implementation Phases
Staffing
What combination of people can best perform the work?
What are the gaps (skill sets and/or work) between what we need for our customers/stakeholders and what we have or are performing?

Team Members
UCOP CHANGE ROADMAP

Roadmap Overview – Page 1

Communications
Human Resources (HR), Project Management (PM), Space (S), Budget (B)
## UCOP Change Roadmap

**Strategic Phases**

<table>
<thead>
<tr>
<th>Mission 1</th>
<th>Strategic Analysis 2</th>
<th>Strategic Goals 3</th>
<th>High Level Design 4</th>
<th>Transition Analysis 5</th>
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<tbody>
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<td>q Obtain leadership approval</td>
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**Strategic Milestones**

- Leadership meetings followed by Town Hall or other all-staff meeting
- Develop website
- Notify stakeholder groups as appropriate for phases 1-3

**Mission 1 Milestones**

- Leadership communications
- Leadership communications

**Transition Analysis 5 Milestones**

- Leadership Meetings
- Town Hall or all-staff Meeting
- Brown bag presentations/ community chats
- Publish all-staff presentations to website
- Presentations to stakeholders as appropriate

**Communication Milestones**

- Leadership communications
- Leadership communications

**Human Resources Milestones**

- Develop project plan (PM)
- Identify project team with roles and responsibilities for high level design team (PM)

**Human Resources (HR), Project Management (PM), Space (S), Budget (B) Milestones**

- Develop project plan (PM)
- Create budgets (B)

**Creating a go/no go decision**

- Identify resources and review workgroup facilitator (PM)
- Draft job descriptions (HR)
- Create / update organization charts (HR)
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### Implementation Milestones
- Identify skill sets
- Identify service level agreements (SLA)
- Regular (weekly/biweekly) staff updates
- Brown Bag presentations on detailed design and community chats
- Publish proposed org structure to website
- Presentations/consultations to stakeholders as appropriate
- Workshops tailored to detail sign dept/unit needs
- Employee communication regarding Human Resource support services
- Finalize job descriptions (HR)
- Classify job descriptions (HR)
- Post jobs (HR)
- Alert facilities/plan move (S)
- Review compensation guidelines (HR)
- Validate project timeline and adjust for compensation guidelines (PM)

### Detail Design Milestones
- Hire employees
- Define and negotiate service level agreements
- Plan work transition and capture knowledge
- Regular staff updates on job openings, appointments
- Update Org chart as hires are made and post to website
- Manager/supervisor communications, as needed
- Brown bag presentations/community chats
- Status update to stakeholder as appropriate
- Workshops tailored to staffing dept/unit needs
- Employee communication regarding Human Resource support services
- Employee communication regarding layoff process and timing, if applicable
- Monitor budget (B)
- Validate project timeline and adjust for staffing tasks (PM)
- Validate project team and roles and responsibilities (PM)
- Schedule move (S)
- Implement move (S)
  - If applicable
    - Create layoff plan (HR)
    - Approve layoff plan (HR)
    - Deliver layoff notices (HR)
UCOP CHANGE ROADMAP

Vision/Values/Culture

Implementation Phases

Start Up/Transition
8.

Assessment/Refinement
9.

Ensure readiness
Perform pilot (dry run)
Test customer satisfaction
Redesign processes / workflows as needed
(Renegotiate service level agreements / integration points

Evaluate metrics
Assess customer/stakeholder satisfaction
Perform external review
Develop plan to address metrics, customer/stakeholder satisfaction and external review
Develop sustainable systems
Celebrate!

Regular staff updates on transition of work
Develop department directory
Introduce department directory to customer/stakeholder
Brown Bags to introduce new units, updates as needed and staffing changes

All dept/unit launch/celebration event

Validate project timeline and adjust for start up and transition (PM)
Conduct lessons learned meeting (PM)

Close project (PM)
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