

2009-2010

Position: Sr Mgr, OPS IT Service Desk, XITX1
 OCCIO
 Government Services
 Start Date: 31-Mar-08

Priorities Selected

- | | |
|----------------------------|--|
| Government | <ul style="list-style-type: none"> Stewardship -Policy Delivery, Operations/Service Delivery, and HR and Diversity |
| Government Services | <ul style="list-style-type: none"> Implement an OPS green agenda aligned with climate change initiatives Implement an integrated HR Transformation and diversity agenda across the OPS Reduce program risk through modernization of the I&IT legacy applications/operations |
| OCCIO | <ul style="list-style-type: none"> More Reliable, Cost Effective Solutions More Convenient, Accessible Service Delivery Dependable, Professional I&IT Staff |

Accountabilities

I understand and accept my responsibilities:

- Under the (OPS) Accountability Directive and related directives, policies and guidelines
- For the principles of ethical behaviour, lawful use of public resources and quality service
- As a manager and a public servant, to advance organizational values, including the value of diversity, both for the people we employ and the people we serve
- I understand and support achievement of the goals of the OPS Diversity Strategy
- To achieve results by demonstrating the leader/manager competencies: Delivers; Transforms; Connects; and Inspires.

CONFIRMED

Performance Commitments

Key Commitment	Performance Measure	Results Achieved
Operational Performance Measures	1. Will Meet SLA commitments regarding Service Desk Accessibility (Grade of Service, Abandonment Rate) 2. Will Meet SLA commitments regarding Service Desk Customer Satisfaction 3. Will continue to make "Resolution at Tier 1" a short-term and long-term focus for the OPS IT Service Desk to further reduce our rate of dispatch to Tier 2. (Done by further enhancing training and working with service partners to download more tools and access to the Service Desk)	Mid Year Results Achieved: 1. Accessibility Results: Grade of Service = Q1 / 70%, Q2 / 86%. Our Q1 results were influenced by the reduced staffing that carried over from Q4 of F08-09. Once funding was approved and received, we were able to staff up to previously approved levels. Training & Orientation of new staff took 6-8 weeks to complete fully. The staffing increase yielded the anticipated results in Q2 as we achieved our SLA at 86%. Abandonment Rate = Met Commitment (Q1 / 4%, Q2 / 2%) 2. Customer Satisfaction Results Currently exceeding on this commitment (>=85% customers satisfied or extremely satisfied). Through Q2 our Year To Date result is 89.6% for the OPS IT Service Desk.

		<p>Through 2 Quarters, we have received 17,646 surveys submitted by our customers. This projects to 35,292 surveys submitted for F09-10 which would be a 26% increase over F08-09. Our rate of return on surveys sits at 7% for F09-10. Compared to an overall rate of return of 5.2% in F08-09.</p> <p>3. Resolution at Tier 1 Results This Key Performance Indicator remains a focus area for the OPS IT Service Desk. Thus far in F09-10, we have achieved an RTO of 74.6% through Q2. This falls in line with our goals for this fiscal of maintaining above a baseline of 70%. We have continued to support this initiative through our "Tier 1.5" function that was implemented in Q1. This function reviews certain desktop requests prior to them being dispatched to a Field Services technician. This allows us to not only catch requests that could be resolved or fulfilled at the desk, but also identify training needs for analysts who needed to leverage the function. All-in-all, this has been quite successful and can easily be scaled up to yield even better results if additional resources were allocated/made available.</p> <p>-----</p> <p>End of Year Results:</p> <ol style="list-style-type: none">1. Grade of Service for F09-10 - 80%. Overall accessibility for the OPS IT Service Desk increased in F09-10 from F08-09 (78%) by 2%. This also resulted in our average wait times decreasing from 41 seconds in F08-09 to 38 seconds in F09-10. We received 791,048 contacts in F09-10 - an average of 65,920 per month. Our Abandonment Rate target was met for the year with an end result of 3%.2. Customer Satisfaction for F09-10 - 90.6%. Exceeded this commitment (>=85% customers satisfied or extremely satisfied). Received 29,645 satisfaction surveys from our customers in F09-10 - a return rate of 8.7%! This marks an increase in surveys received of 31.4%!3. Resolution @ Tier 1 for F09-10 - 75.2%. Service Desk maintained our focus on Resolution @ Tier 1 throughout the course of F09-10. We have maintained our "Tier 1.5" function as a small group of Sr. Desktop Support specialists who focus on
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		<p>more technical issues with Microsoft Office and other common issues with Microsoft Windows & the HP Radia Agent. We have implemented a quarterly rotation of analysts through this Tier 1.5 function. It is currently staffed by 5 FTE (4 analysts, 1 Queue Manager). As more access, tools & knowledge shifts from Tier 2 & Tier 3 groups, we will have the ability to scale up Tier 1.5 to cost effectively resolve even more incidents that would previously have needed a dispatch to a resource in the Field.</p>
<p>Implementation of Automated Password Reset</p>	<ul style="list-style-type: none"> - Implementation of previously procured Courion Password Courier software - Successful completion of a controlled Pilot - Deployment of desktop component to maximize current license allocation (30k) - Obtain 50% customer uptake by end of Q4, F09-10 	<p>Mid Year Results Achieved:</p> <ul style="list-style-type: none"> - Statement of Work established with VOR to support the build of our UAT environment, our production environment, the training of OPS support staff and the creation of the necessary build & support documentation. (Q1) - UAT Environment was built successful including all integration points (Remedy, Active Directory, Enterprise E-mail, etc) (Q1) - Initiated Release Management process to support the Pilot & Production Roll-out. This included the creation of a communication & marketing plan, the development of Incident Management Support Models, Knowledge Records & Training Material for Service Desk, etc (Q2) - Completed Initial Pilot with the Health Services Cluster. All base functionality tested successfully leveraging the customer pilot package developed by the project team. - Formally engaged (through ITSML) the other 8 clusters for the development of a "customer team" to plan, coordinate and execute an enterprise-wide Pilot in Q3. Cluster leads assigned, work well under way. Targeting late October / early November for completion of said Pilot. (Q2 initiated, Q3 completion) - Threat Risk Assessment completed successfully (Q2) - Completed all ACT & ARB Architecture Review Checkpoints. This project became the first internal ITS project to complete all checkpoints and have a completed/approved architecture to support the production build. (Q2)

		<p>-----</p> <p>End of Year Results:</p> <ul style="list-style-type: none">- "Account PRO" branding established to align with existing offering from OSS for PKI Self-Service Password Reset ("PKI PRO") - Password Reset Online...- Production system built & tested successfully, including all necessary points of integration (EIT Remedy, Active Directory, Corporate Security's Secret Question & Answer Database, etc). - COMPLETED December 18th- Completed ITS Internal Pilot involving ~150 employees who tested and reported back on all end-user functionality based on the production system.- Completed Production Pilots with ETC, LRC, CSC, Justice & CAC (Health & CYSSC remain open due to a technical issue continued to be worked operationally with our vendor). Feedback from Pilots was quite positive. Minor recommendations received regarding terminology/wording enhancements were implemented quickly.- Final Threat Risk Assessment completed & published. Minor recommendations to be reviewed and acted on in F10-11.- Release Management "Go" decision obtained on January 21st for production pilot commencement.- Implemented fulsome marketing & communication plan to support the production roll-out and user adoption of Account PRO service. Included marketing scripts put into production with Service Desk Analysts to use when customers call for a manual password reset, communications to OPS client ministries, updates to EIT notifications, updates to Service Desk IVR messages and E-mail "tips & tricks"- Implemented training videos that were implemented on Service Desk Online and distributed as a component of the launch communication. Walks customers thru registration, enrolment & usage of Account PRO.- Initiated 1st Production deployment to CAC on January 26th.- Full deployment to LRC completed on February 10th- Full deployment to CSC completed on February 24th
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		<ul style="list-style-type: none"> - Fully deployment to ETC completed on March 23rd - Current deployment penetration of Account PRO = 30,333 PCs
<p>Management of OPS Incident Management Process</p>	<ul style="list-style-type: none"> - Delegated Management of this enterprise process on behalf of Service Management Director. - Provide guidance / direction to OPS Incident Manager (01ASM) - Prioritize support modelling efforts internally to ITS and with each cluster. - Lead operation of Bi-weekly post mortem review meeting with ITS Corporate Chief and ITS Service Owners. - Lead the work associated with updating the two key process standards with OCCTO (GO ITS 37 & 55) - Establish regular Incident Management operational reporting utilizing existing (and new) Key Performance Indicators to further enhance the Health & Maturity of the process. - Continue roll-out of web-based tools to better support the real-time and proactive elements of the process (IMAware / Web Support Models) 	<p>Mid Year Results Achieved:</p> <ul style="list-style-type: none"> - Have created a revised Terms of Reference for the Bi-Weekly Post Mortem Review meeting with ITS Corporate Chief & Service Owners. The intent is to broaden the focus of the meeting to include elements of Change Management, Problem Management & Service Level Management. Approval from Director pending. Implementation in Q3. - Completed the Roll-out of "IM Aware" (real-time IM dashboard) to all designated Cluster Service Management staff. Very well received by all. The end result has been a mild reduction in workload with our Incident Coordinators as they are taking fewer status update calls from key IM Stakeholders. Very successful. - Represented ITS in the review of GO-ITS 37, the Enterprise Incident Management Process. Worked closely with OCCTO and the IT Standards Council to provide insight into the changes that were being proposed and the implications. Steered the work to the IT Service Management Leads Committee where the ownership of completing this process standard update has shifted to ITS. Now targeting completion by end of Q3. - As a result of the Ontario.ca review conducted by an external party, led the development of an "Action Plan" for improvements in Incident Management. Approximately 64% through the items identified in the plan which include significant Training & Awareness elements. Developing Role-based training material for Incident Management to be initiated when an employee is onboarded in ITS and on a recurring basis for anyone wanting a refresh (monthly cycle via webinar). - Led the development of Incident Management Monthly "Scorecard" reports to be distributed to Cluster Service Management. This will provide insight in Cluster IM Performance (MTTR) and

		<p>assist in the clean-up / action of aged incidents. To be finalized in Q3.</p> <p>-----</p> <p>End of Year Results:</p> <ul style="list-style-type: none"> - Issued update to ITS Incident Management Policy & Procedure Guide, taking that document from version 1.3 to 1.4.1. - Implemented "Incident Management User Community" forum where IM stakeholders in ITS & the Clusters can work together on the continual improvement of the IM process and how it's executed (compliance) across the OPS' jurisdictions. - The "Action Plan" developed for improvement in Incident Management based on the Ontario.ca outage review from February, 09 is 90% completed. The majority of this plan was rooted in improving training and awareness. Thus far, have developed and implemented Training Manuals for the Incident Analyst Role (generic Tier 2 resource role), the Situation Manager Role, the Incident Agent Role, and the Partner Knowledge Management Support Model Liaison Role. - Given the importance of the Situation Manager Role, this was made our initial point of focus for Q4. Trained 177 Cluster & ITS staff on the responsibilities of this role. - Implemented Cluster Incident Management monthly scorecards, distributed to Cluster Service Management Heads & management. This will greatly improve MTTR on Cluster application incidents and will result in fewer aged/stale incidents. - COMPLETED in December, 2009.
<p>Implement Low Intensity Project Management Framework</p>	<ul style="list-style-type: none"> - Plan, design, and implement Low Intensity Project Management Framework for OPS IT Service Desk (Q1, F09-10) - Train / mentor Team Leads & Managers on the use of this framework for all project activity. - Establish consistent governance around project activity that will consume operational resources. - Establish reporting on the status of approved project activity so Sr. Management has visibility and therefore 	<p>Mid Year Results Achieved:</p> <p>Low Intensity Project Management was developed and implemented in Q1 of F09-10 at the OPS IT Service Desk. The results thus far have been quite positive. We now have:</p> <ul style="list-style-type: none"> - Clear governance around all Service Desk project activity as discussed in a weekly Steering Committee Meeting w/ Service Desk Management. - More consistent and predictable outcomes in Service Desk Project Activity (Releases)

	<p>more influence on successful project delivery.</p> <ul style="list-style-type: none">- Establish post implementation reviews to take lessons learned and apply it to future work.- After implementation at the OPS IT Service Desk, socialize the framework with Service Order Management & Best Practice Processes office.	<ul style="list-style-type: none">- More consistent communications occurring during the lifecycle of our projects to key stakeholders at Service Desk & Release Management- Less waste as a result of Service Desk staff participating in project activity that is not approved/funded.- Measurement around the resource time being allocated to project activity at Service Desk. As more data is tabulated, this could inform business cases to support budgetary asks on an annual basis.- Post Implementation Reviews to establish lessons learned and to celebrate successes. <p>We have already socialized our UPM-based framework with the Health Services Cluster and the Development and Deployment Office in ITS.</p> <p>We will be presenting the framework to Service Management's governance committee in October/November of F09-10 to see if it can be leveraged in Service Order Management or the Best Practices Process office.</p> <p>-----</p> <p>End of Year Results Achieved:</p> <ul style="list-style-type: none">- Presented results & Feedback to Branch Governance Committee in February, 2010.- The benefits of this implementation were many from the Service Desk Analyst to the Sr. Manager of the Service Desk. Our Service Quality Office is now better able to schedule all the work needed to support the successful delivery of a project or a release as they are engaged early and consistently, our Team Leads & Management are intimately aware of the project activity on-going at the Service Desk - NO SURPRISES, and our Service Desk Analysts are now regularly kept abreast of what is coming 'down the pipe' in the near future.- Estimation of workload associated with a project or release is continuing to be refined. We now have the ability to look at concurrent projects and make scheduling changes to ensure we aren't over-allocated at any one time thus compromising our operation.- Have also provided our methodology/framework to the
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		Development & Deployment Office (Q4) as they were interested in applying something similar to their small projects.
Management Fundamentals	<ol style="list-style-type: none"> 1. Will continue to act as a vocal leader in the Service Management Branch focused on both branch and divisional priorities. 2. Accountable for the Financial Management for the OPS IT Service Desk - delivering services inline with estimates/allocation and actively contributing to the ITS Costing/Pricing model development and sustainment. 3. Accountable for ensuring management alignment at the OPS IT Service Desk with government priorities such as Diversity and the OPS Green Strategy. 4. Act on behalf of the Director, Service Management while she is away, unavailable or when otherwise instructed. 	<p>Mid Year Results Achieved:</p> <ol style="list-style-type: none"> 1. I continue to act as a vocal part of the SMB Senior Management Team. I communicate branch & divisional priorities through various means: My Blog, 1:1 w/ my Managers and their staff and through Monthly Team Meetings. 2. Have continued to contribute to the ITS Cost Model initiative whenever asked. Have allocated time to work with the Costing Team to review Q4 actuals vs. estimates and to provide my insight into cross-division activities such as "Perform Incident Management". Have supported their analysis with supporting data when requested. 3. Completed. 4. As needed, have continued to Act for the Director of Service Management when she has taken vacation. <p>-----</p> <p>End of Year Results:</p> <ol style="list-style-type: none"> 1. As a leader in the Service Management Branch, I took accountability for the compilation of evidence and report back on several Audits in Q4 of F09-10 - specifically the Systrust Audit and the Follow-up to the Service Management / Service Desk Audit from F08-09. <ul style="list-style-type: none"> - For the Systrust Audit, I compiled populations & evidence to support a response back on 40 individual controls! I provided over 200MB of evidence to support those responses. Responses received from the Auditors (Deloitte & Internal Audit) and the ITS Lead were quite positive. - For the Follow-up to the Service Management Audit, I compiled 75MB of supporting evidence to the recommendations identified in F08-09. I demonstrated that our Service Level Management compliance increased by ~84% from the initial audit. The Draft Follow-up report has been issued and all recommendations for ITS are GREEN - a significant accomplishment when compared to last year's results. 2. Delivered Service Desk services in F09-10 on budget, as per my allocation. I have

		<p>also continued to work with the Cost Model team as appropriate in the reviews of actuals vs. estimates and to ensure the activities identified in F08-09 are still inline with and reflective of our operation.</p> <p>3. Completed - Finalized 'Green Print Kit' review of OPS IT Service Desk St. Catharines and authorized the removal of 2 printing devices from the floor to further contribute to the OPS Green Initiative</p> <p>4. As needed, have continued to act for the Director, Service Management when she has taken vacation.</p>
<p>Formal Assessment to support Tier 1 / Tier 2 Rationalization</p>	<ol style="list-style-type: none"> 1. Will re-visit analysis completed in F08-09 regarding work shifted from "right to left" (i.e. From Tier 2 to Tier 1 - an industry philosophy). 2. Will track operational progress and the outcomes of initiatives planned/executed in F09-10 to continue monitoring/tracking this shift. 3. Will deliver formal business case to Director, Service Management by end of Q2, F09-10. 4. Business case will be updated at the end of Q3 & Q4 with new supporting data gathered. 	<p>In Q1, I completed a detailed, data-driven analysis of opportunities to support rationalization in the area of Service Desk, Order Desk & Field Services. This analysis was distributed to the ITS Senior Management Team and discussed. This spawned a more long-term piece of work led by the Director of Service Management whereby we are working on a plan that will reduce the FTE count across these three support areas by approximately 10% (~50 FTEs). I have been given key points of analysis to support that work and am actively contributing in weekly status meetings with the Director of Service Management and the extended team.</p> <p>Once the analysis is completed and vetted, it will be used to populate a business case / plan of action (30, 60, 90 days) to achieve the FTE savings requested.</p> <p>-----</p> <p>After completing the analysis of opportunities to rationalize in the area of Service Desk, Order Desk & Field Services, I identified a 40 FTE opportunity across these areas.</p> <p>Shortly after this report was completed, my Director took leadership over a LEAN / Capacity Analysis project which involved securing assistance from the consulting community. Carly Rian was contracted to lead this exercise at which point I represented the OPS IT Service Desk. I met regularly with the project team and provided operational/HR insight and analysis/metrics to support the work.</p>

<p>Quality Assurance & Web Strategy</p>	<p>1. Will implement a web-based tool to enable the OPS IT Service Desk Quality Assurance program.</p> <p>2. Will implement a consolidated Service Management Branch intranet website for staff. This will enable:</p>	<p>1. Implemented the Service Quality Uniform Assessment Database (SQUAD) successfully! We enabled:</p> <ul style="list-style-type: none"> - online analyst ticket reviews - online analyst call reviews - online submission of training requests (both by analysts or by supervisors) - online tracking of training sessions (time committed) - online quizzing to allow for more focused training sessions <p>The results of this implementation have been dramatic. We have increased the average call review score from 62% in March of 09 to 84% in June of 09. We have increased the average ticket review score from 82% in March of 09 to 92% in June of 09.</p> <p>2. Implemented "Service Management Online" in Q2 of F09-10. We enabled:</p> <ul style="list-style-type: none"> - A central web-location for all employees in Service Management to gain access to branch information. - Senior Manager & Director Blogs to improve downstream communication to staff - Online Training manuals for Service Desk, Order Desk & the Best Practice Process Office - Access to Operational Reports - Access to helpful IT & non-IT links to other intranet websites to help staff locate needed information. - A point of convergence for existing branch point web tools such as IM Aware, Service Order Desk Online, SQUAD, and the Online Change Calendar. <p>This initiative has been very successful. We have already received over 54,000 page views from over 500 unique visitors. Our Senior Manager & Director blogs have been read over 13,000 times and this is just within the last 3 months!</p> <p>-----</p> <p>End of Year Results:</p> <ul style="list-style-type: none"> - Implemented prior to mid-year. - Stats Update - As of March 31st, 2010 - Service Management Online has already generated over 110,000 views from over 1300 unique visitors. This means that not only has it become a valuable resource of information for Service Management Employees, but also a broader population
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		inside of ITS & in the Cluster I&IT community.
Review of Service Desk Accessibility SLA Targets	1. Will review the Service Desk Accessibility SLA Targets and cross reference them to the new funding reality (economic pressures) and the maturity of the organization from a change and problem management perspective.	<p>1. Led the development and implementation of a new calculation methodology for the Service Desk accessibility SLA Target - Grade of Service.</p> <ul style="list-style-type: none"> - After a consult with the Industry (Gartner/InfoTech), we implemented processes and procedures which enabled Team Leads to track the intervals at the Service Desk where a spike in volume occurred due to a major incident (system failure). Then we implemented the logic to remove these intervals from our SLA calculation. The rationale for taking this approach is that when we have a major incident such as an Enterprise E-mail outage, that single event actually implicates multiple SLA Targets. The Service Desk accessibility target is implicated due to a spike in call volume, EES availability metrics are implicated and a EES System Failure Restore Time target. <p>Implemented successfully in Q2, F09-10 as a component of the "Meet SLA Action Plan" conducted in Q1 across the division.</p> <p>-----</p> <p>End of Year Results:</p> <ul style="list-style-type: none"> - Implemented prior to mid-year. - Presented to ITS Senior Management Table in December to implement the revised calculation methodology. - Approved by Marty Gallas. - Updated Business Intelligence Environment to support this change in Q4. First Service Level Management Customer report featuring this change will be for April, 2010 issued in early May, 2010.
Implementation of "Service Desk Online" support portal for 68,000 OPS Customers.	Designed, Developed, Implemented Web-based portal for OPS IT Service Desk customers that would offer real-time customer information & be the point of convergence for all existing and future self-service offerings.	<p>Designed, Developed & Implemented "Service Desk Online" web portal with the following functionality:</p> <ul style="list-style-type: none"> - A 'one stop shop' for all of our existing (and future) offerings (S.ODO, Account PRO, EIT Self-Ticketing, IT Support ICON on OPS Desktops, etc) - Account PRO enablement (Ability to register, enrol and reset your password, instructional videos on how to use the service) - EIT Self-Service Ticketing

		<ul style="list-style-type: none"> - Customer-facing Knowledge Base (over 500 solutions available today, over 400 instructional videos available today, when a solution is found by the customer, a ticket is created in EIT for tracking purposes, self-service customer satisfaction surveys are then sent to the customer) - Real-Time Service Desk Availability Monitor – it connects to our phone system and lets the customer know if now is a good time to call based on average wait times in the last 30 minutes. - Real-Time System Outage Indicator – System/Application outages that are driving call volume to the Service Desk will be posted on Service Desk Online with updates. A customer can choose to be e-mailed automatically when service is restored. They are context specific to the cluster the customer is connecting to the website from. - Service Desk IT Announcements – Service Desk Online is plugged in with our communication service. Notices sent are also available on our website. They are context specific to the cluster the customer is connecting to the website from. - Quick IT Links – Key links to websites that are relevant to our customers. They are context specific to the cluster the customer is connecting to the website from. - Customer Satisfaction Survey integration – the ability to view past surveys you’ve submitted or log new surveys from the customer’s ticket history - Real-time Customer Information (the ability for a customer to view their workstation name, IP Address, domain name, user name, phone number in the GAL, etc)
<p>Performed Review of & Update to OPS Customer Satisfaction Surveying</p>	<p>To review & continually improve the Customer Satisfaction surveying capabilities - including the logics of the survey, how it's visually represented and where it's hosted.</p>	<ul style="list-style-type: none"> - Performed collaborative review of existing Satisfaction Survey structure/design with Service Order Management & Field Services - Added a 5th option to the survey - "Not Applicable" - Adjusted the order of the survey options to be more logical. From Left to Right "Extremely Satisfied, Satisfied, Dissatisfied, Very Dissatisfied, Not

		<p>Applicable". This was done to mitigate the customer accidentally selecting the first option previously ("Very Dissatisfied") when they had a positive support experience.</p> <ul style="list-style-type: none"> - Migrated the delivery of surveys from the EIT Remedy System to Service Desk Online. This gave us more flexibility in terms of the visual experience and also made it easier and more cost-effective to maintain. - Dramatic overhaul to the visuals of the survey. Completely re-designed and aligned with the visual experience on Service Desk Online. - Enabled "dynamic" survey delivery. Previously, if your ticket was resolved by Field Services, you would receive the Service Desk survey and then had to click 'next' to continue on to the Field Services survey. Now, the survey has automated logic which determines which surveys you should receive and then delivers them to the customer on one page. - Automated follow-up requests in EIT. When a customer requests a follow-up in the survey, in the past this just fired a notification to Service Desk management. This has now been integrated in EIT. It now logs a ticket in EIT and delivers it to the Service Quality Team who will assign it to the appropriate area for follow-up. This allows us to track the actions taken in response to a customer's request. It also enables us to measure how timely we follow-up with the customer and complete service improvement activities. We have also implemented reports for the OPS IT Service Desk to track the % of the time that Team Leads are following-up with customers within 24 hours. This is a KPI that will be included in their F10-11 Performance & Development Plans.
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Learning Commitments			
Key Competency	Learning Plan Activity	Details	Date Completed
Deliver	Best Practices	ITIL V3 Foundations ----- Completed ITIL V3 Foundations successfully in early September, F09-10.	Sep 04, 2009
Deliver	Other learning activities	HDI Support Centre Director Training -----	

		Did not complete. Will reconsider for F10-11 Learning Plan.	
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Initial Performance Plan Review and Comments (May-22-2009)

Date	Created By	Action	Comment
May 13, 2009	Jim Kirk (employee)	Submitted For Initial Review	I'm looking forward to another exciting year at the OPS IT Service Desk. The work I intend to deliver on this fiscal will go to the long-term sustainment / excellence of the OPS IT Service Desk. This will be accomplished through taking staff engagement to an even higher level, refreshing our delivery model to reflect the changes that have taken place since January of 2005, implementing additional Self-Service options and by formalizing a project management framework that will result in greater consistency and success of project delivery.
Date of Discussion:	May 22, 2009		

Midterm Review and Comments (Oct-30-2009)

Date	Created By	Action	Comment
Oct 30, 2009	Wynnann Rose (manager)	Midterm Review Finalized	You're having a great year so far! Thanks for all you do.
Oct 14, 2009	Jim Kirk (employee)	Submitted For Midterm Review	As always, the first 2 quarters weren't without a surprise or two, but I am pleased overall with the successes realized to date as they relate to my Key Commitments.
Date of Discussion:	Oct 23, 2009		

End of Term Review and Comments (Apr-14-2010)

Date	Created By	Action	Comment
Apr 14, 2010	Wynnann Rose (manager)	End of Term Review Finalized	Jim You had another really great year. Over and above your Service Desk job, you did double duty in the Best Practice office. ITS owes you a debt of gratitude for going the extra mile with two portfolios - totalling over 200 employees! Thanks.
Date of Discussion:	Apr 12, 2010		

2009-2010

Position: Sr Mgr ITSM Processes, XITX1
 OCCIO
 Government Services
 Start Date: 20-Jul-09

Priorities Selected

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| OCCIO | <ul style="list-style-type: none"> More Reliable, Cost Effective Solutions More Convenient, Accessible Service Delivery Dependable, Professional I&IT Staff |

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Management Fundamentals	1. Will continue to act as a vocal leader in the Service Management Branch focused on both branch and divisional priorities. 2. Accountable for the Financial Management of the Best Practice Process Office (BPPO). Contributing to the ITS Costing/Pricing Model Development and Sustainment. 3. Accountable for ensuring management alignment in the BPPO with government priorities such as Diversity and the OPS Green Strategy 4. Act on behalf of the Director, Service Management while she is away, unavailable or otherwise instructed.	1. I continue to act as a vocal part of the SMB Senior Management Team. I communicate branch & divisional priorities through various means: My Blog, 1:1 w/ my Managers and their staff and through Monthly Team Meetings. 2. Hae continued to contribute to the ITS Cost Model initiative whenever engaged by the Costing Team. Have allocated time to work with the Costing Team to review Q4 actuals vs. estimates and to provide my insight into cross-division activities such as "Perform Incident Management". Have supported their analysis with supporting data when requested. 3. Completed. 4. As needed, have continued to Act for the Director of Service Management when she has taken vacation.

		<p>Refer to "End of Year" results documented in Service Desk Sr. Manager position PMP...</p> <p>End of Year Results for BPPO:</p> <ul style="list-style-type: none"> - Created new office/section Vision & Mission Statement for BPPO to ensure all managers/staff understood why we were here and where we were heading. - Implemented monthly site meetings for all staff in the BPPO. Assigned a manager to lead the creation of a consistent slide deck so all staff were receiving consistent information regarding office/branch activities, HR updates, kudos/recognition, etc - Implemented monthly Process Coordinator meeting where all 20/21ASY employees have a meeting with the Sr. Manager. No agenda, open discussion, no topics off limits. - Implemented new Performance & Development Plans for all BPPO staff, by position. Included meaningful descriptions of expectations/responsibilities and commitments throughout the upcoming fiscal year. Researched and applied baseline training objectives for all staff. - Actively Blogged on Service Management Online to share relevant information to staff regarding the direction for the office and achievements realized throughout the fiscal year.
<p>Implement Problem Management in ITS</p>	<p>1) Establish and operationalize the problem management process in ITS that will:</p> <ul style="list-style-type: none"> a) Facilitate proactive & preemptive activities reducing incident recurrence and lowering overall incident volumes b) Provide more empowerment & increased efficiency of first line through the provision of better known error information <p>2) Develop process health measures that will facilitate action for service/process improvements</p>	<p>Mid Year Results:</p> <ul style="list-style-type: none"> - Transitioned Secondary Data Centre Operations from "Pilot" to Steady State in Q1, F09-10 - Implemented Problem Management with Telus (cluster-by-cluster) resulting in tremendous outcomes - Eliminated Major Incidents from recurring in 60% of all previously affected sites, Reduced / eliminated incidents on a particular device in 2/3 of all cases, reduced the average major incidents per site by 67%! - Initiated implementation of Problem Management with Desktop Services (team identified/solidified, initial training completed, problems being logged, now in stabilization mode) - Engaged with CCSI for vendor implementation of Problem Management using the same toolkit developed for Telus

		<ul style="list-style-type: none">- Planning Primary Data Centre Operations engagement to begin by end of Q3 for Q4 implementation- Scoped out steady-state Problem Management Practice reporting (monthly interval) to be completed in Q3, F09-10.- Implemented Executive Notifications to be delivered on resolution (and after the monitoring period) on problems with an impact of 'major'. To be delivered to Service Owner, CRM Directors, Service Management Director and Service Delivery Manager(s).- Downloaded Problem Management Q&A to Incident Coordinators to be asked at Major Incident Post Mortems. This has resulted in cleaner problem identification and has given capacity back to the Problem Management Team (they were attending all post mortems)- Completed "Real Life" presentation describing Problem Management in 'laymans' terms. Will be used for training outside of Service Management to raise awareness and understanding of the process. <p>-----</p> <p>End of Year Results:</p> <p>Problem Management Activations:</p> <ul style="list-style-type: none">- Data Centre Operations (Release Management "Go" received on March 11th) - this activation included the training of over 140 Data Centre Operations staff- Desktop Services (Tier 3 incidents, supporting technologies - Radia)- CCSI (vendor activation similar to Telus) <p>Problem Management Metrics:</p> <ul style="list-style-type: none">- 377 Managed, 330 closed, average time to resolve = 90 days (includes post resolution stabilization period), trained over 250 ITS staff on Problem Management, Participated in 28 releases this year where Known Errors were identified and logged ahead of implementation.- In February, 2010 implemented Monthly Problem Management practice report which a focus on the following Key Performance Indicators - 1. Open Problems, 2. Problem Turnover Ratio, Problem volume vs. Age analysis, Resolved problems by closure code. Participation in Enterprise Problem Management Pilot:
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		<ul style="list-style-type: none"> - Provided ITS Problem Management Process & Procedures to GSDC for input into the development of their supporting collateral - Provided our Root Cause Analysis models - Implemented EIT changes to support the needs of the pilot (minor work effort) - Facilitated the appropriate EIT access to identified GSDC staff - Conducted all EIT training to identified GSDC staff - Assisted GSDC in establishing operational problem management reporting capabilities <p>Benefits of Problem Management in ITS: F2008-2009 Major Incidents - 3813 Priority 1 – 550 Priority 2 – 3263 F2009-2010 Major Incidents - 1806 Priority 1 – 412 Priority 2 – 1394 This marks a 25% reduction in Priority 1 incidents This marks a 57% reduction in Priority 2 incidents This marks an overall reduction in Major Incidents of 52%</p>
<p>Implementation of Service Asset & Configuration Management (SACM) for ITS.</p>	<p>SACM project will establish a single authoritative inventory source that will identify, control and maintain ITS service assets and configuration items while protecting and ensuring their integrity across the entire service lifecycle.</p> <ol style="list-style-type: none"> 1. Define and implement process, roles, technology, measurement and audit capabilities 2. Establish the capability to provide valid inventory information in support of PC inventory and user seat quarterly billing 3. Eliminate legacy tools/data sources (CIHS, NMDB) where duplication would be counterproductive and non-efficient 4. Provide reports and data analysis capabilities to ITS stakeholders that require asset and config management information to conduct their business 	<p>Mid Year Results:</p> <ol style="list-style-type: none"> 1. SACM Policy & Procedures Project is progressing well and is on target. <ul style="list-style-type: none"> - Have defined the framework for the Policy & Procedures Guide. The PPG will be higher level and contain the core principles and the roles & responsibilities. It will also include genericized procedures that can be used to generate local work instructions for new services that are implemented (or migrated to SACM) in the future. - Are authoring local work instructions for existing services deemed in scope. 2. Completed successfully. Collaboratively reconciled the desktop assets in the CMDB by the use of a variety of tools in existence in the environment (Radia, e-Policy Orchestrator / Anti-Virus data, login scripts, etc). Reconciled and updated production CMDB to accurate ~73,000 count to support user seat quarterly billing. 3. Data Centre Operations SACM Support Project is on track with no identified issues being tracked. Both CIHS & the NMDB are

		<p>on track to be integrated/federated with the CMDB.</p> <p>4. Thus far the majority of report development and training completed has been in support of PC Inventory project. Provided BI Training to Desktop Services, Asset Management and Cluster Resources.</p> <p>-----</p> <p>End of Year Results (by Project Stream): Asset Lifecycle / SACM PPG Stream:</p> <ul style="list-style-type: none">- Through 37 formal process development workshops with ITS stakeholders, developed Service Asset & Configuration Management Process guide, Policy & Procedure guide & Work Instructions by Asset Type (consumable vs. solution-based) and service!- All-in-all, over 600 pages of production documentation was authored to support the implementation of this Best Practice in ITS.- Developed Training Material & Curriculum and trained 1,036 ITS employees on SACM Process & Procedures (90% train rate). This included representation from virtually every branch (Service Desk, Order Desk, BPPO, Solutions, Data Centre Deployment, Data Centre Operations, CRM, PMO, Corporate Services, etc) <p>PC Inventory:</p> <ul style="list-style-type: none">- Completed successfully.- PC Inventory was used in the issuance of both Q3 and Q4 User Seat Billing. <p>Data Centre Operational Support - CIHS Decommissioning</p> <ul style="list-style-type: none">- CIHS switched to "read-only" on March 19th. Production data migrated to EIT CMDB.- Completed over 20 iterations of data migrations into UAT environment for Data Centre Operations staff testing.- Migrated 3,496 physical components, 124 operating system images, 18 monitoring policies, 1,899 production websites (URLs), 427 database instances.- Mapped 216 ITS production systems/solutions to the above components in the CMDB creating a 'relationship view' that never existed before.- Added contact name associations for the above components and their solutions.
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		<ul style="list-style-type: none"> - Imported all of the migrated data into our Business Intelligence environment to allow for enhanced reporting and analysis of Data Centre Operations asset information. Data Centre Transition Support (NMDB) - Developed & Implemented federation connectivity between NMDB and EIT CMDB ("NARC"). Enabled real-time synchronization between an operations management tool and our authoritative CMDB - 2,432 assets synchronized in real-time - Streamlined creation of assets during solutions process
<p>Support Guelph Data Centre Transition using Service Management Best Practices (Year 2 of 4 year project)</p>	<ol style="list-style-type: none"> 1. Develop and implement change/config process for updates to GDC inventories (iron and apps) 2. Develop GDC Transition SM framework, funding/resource requirements, project plan/deliverables, integration requirements into ITS operational processes 3. Develop and activate new facilities management vendor on OPS ITSM processes for incident, change, problem, config, SLM 	<ol style="list-style-type: none"> 1. On Track. Significant work completed regarding the GDC-specific inventory (iron and applications) in the CMDB. Dedicated Configuration Management Analyst recruited to review Toronto Data Centre change records to ensure associated GDC-specific inventory is maintained until and through the transition. 2. Completed. GDC Service Management Framework completed and signed off in Q2 of F09-10. Funding & Resource requirements completed and submitted. Recruitment underway for resources to assist through the full GDC Transition. Project Plan and deliverables drafted, reviewed and approved. Project Team working from the approved plan. BPPO Practice Managers engaged with project team to ensure seamless integration into ITS operational processes. 3. On track. Draft Policy & Procedure Guides in place for facilities management vendor (JCI) for Incident, Change, Problem & Configuration Management. <p>-----</p> <ol style="list-style-type: none"> 1. All FM Process, Policy & Procedure guides implemented and approved on time - (JCI Transitional & Steady-state PPGs for Incident, Change, Service Asset & Config, Release Management & Problem Management). All ITS Transitional PPGs completed pending final approval (Incident, Problem, Change, Release & Service Asset & Config) 2. Finalized Funding & Resource Requirements for F10-11. Submitted on time. Approved in principle. This included adding temp FTEs for Problem & Release

		<p>Management. Recruitment for those 2 temp FTEs has been completed (secondments).</p> <p>3. Completed as per note above. Implemented GDC inventory filter in Business Intelligence environment to allow for easy access to information regarding assets (and their configurations) set to be transitioned to Guelph Data Centre from TDC.</p>
<p>Continuous Service/Process Improvement</p>	<p>1) Establish and implement Cluster Module management process and ownership working with ITS Service Planning and CRM.</p> <p>2) Improve ECM process by prioritizing and implementing key process and /or technology improvements (i.e rescheduling, re-assessment, standard changes, etc)</p> <p>3) Integrate Release mgmt with PMO to ensure that projects requiring 'release mgmt' are funded at project charter stage.</p> <p>4) Participate in OCCTO priority roadway process implementations (e*PM, e*SLM, e*SACM, e*SCAT)</p> <p>5) Define and implement process health measures (KPIs) and regular reporting for Problem, Change, Config, Release, SLM, Perf Measurement</p>	<p>1) Cluster Module Agreement process well under way. Templates completed in F08-09 have been shortened and simplified. Q3 deliverable to complete the end-to-end documentation detailing the annual review cycle for existing Cluster Module Agreements. In addition, we are working with the Solutions team under Enterprise Strategic Planning Branch to be looped in when the Customer Requirements Document is completed and signed-off during the creation of new hosting solutions. This will inform upfront the need for a new hosting instance to be added to the Cluster Module Agreement.</p> <p>2. Underway.</p> <ul style="list-style-type: none"> - Currently working to improve/strengthen the governance around ECM. - Have proposals in flight regarding the implementation of rescheduling/reassessment functionality in EIT and in the Common Procedures. - Working on proposals for an Advisory Change Model and a Standard Change Model which will have significant benefits regarding resource/capacity requirements across ITS to participate in change management. - Developing monthly Change Management Practice report which will break down several change management KPIs for ITS as a whole and for each branch in ITS who participates in change management. Will be used to identify areas of improvement, act on them and measure improvement. <p>3) Completed. Release Management now incorporated into Project Review Advisory Board and all release costs are now encapsulated in Project Charters / SoWs.</p> <p>4) Underway.</p> <ul style="list-style-type: none"> - Provided ITS Feedback and assisted OCCTO with the approval of GO-ITS 38 -

		<p>Enterprise Problem Management Standard.</p> <ul style="list-style-type: none">- Working with OCCTO regarding the development of e*SACM standard to ensure ITS SACM PPG is in alignment. <p>5) Full review of all process/practice reports is underway.</p> <ul style="list-style-type: none">- Change Management Practice Monthly Report - due November, 09- Problem Management Practice Monthly Report - due December, 09- Release Management Scorecard (delivered 30 days after each release) underway - due December, 09 <p>-----</p> <p>End of Year Results:</p> <p>1) Cluster Module Agreement process improvement - Completed.</p> <ul style="list-style-type: none">- Streamlined templates used for population of CMAs- Communicated that CMAs would only apply to net-new solutions, not legacy solutions.- Streamlined ITS approval process for CMAs <p>2) Enterprise Change Management (CM) Improvements</p> <ul style="list-style-type: none">- Implemented Reassessment/Rescheduling in ECM. Including updates to ECM Common Procedures & EIT Change Module. Big success! Estimates have this work reclaiming ~2 FTEs worth of capacity on ITS CM Team. This capacity has been transferred to more reporting & Quality Assurance to further improve the execution of Change Management in ITS.- Implemented Change Awareness Program in ITS. Includes taking CAB on the road to key ITS locations across the province (1201 Wilson Ave, Peterborough, North Bay, etc), implementation of provider-based 1:1 process improvement groups which are personal in nature- Implemented Monthly CM Practice reports based on newly developed KPI listing for CM.- Implemented Quality Assurance framework on ITS changes. 5% of changes reviewed per month. Results analyzed and used to drive further improvement.- Implemented workflow update in EIT to automatically determine the appropriate
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		<p>approving jurisdiction based on the impacted parties. This was to meet a Systrust F08-09 recommendation requirement.</p> <p>3) Release Management (RM) Improvements:</p> <ul style="list-style-type: none"> - Implemented RM Scorecards distributed 5 business days and 30 days post activation of a new or modified ITS service. - Established new KPIs for RM based on the 'support echo' experienced post activation. Used to gauge effectiveness of the Release, the communication plan, etc. (% of customers who required support) - Implemented Release Module in EIT! Allows for integration with Change, Incident & Problem modules. Associations between these different records made possible. Significant Reporting Improvements now possible. <p>4) Completed. 5) Completed.</p>
<p>Support "Meeting our ITS SLA Commitments"</p>	<ol style="list-style-type: none"> 1. Develop consolidated improvement plan (working with ITS Service Owners) 2. Provide ITS stakeholders with SLA dashboards, service reports, training on BI cube analysis capabilities 2. Assist with improvement plan activities by conducting SLA education and SLA measurement workshops, executing regular SLA review meetings with Senior Mgmt in Service Areas, establishing links to ITS governance for CSI improvement activities that require funding and/or priority. 	<ol style="list-style-type: none"> 1. Developed / Implemented / Reported back on consolidated improvement plan (Top 3). Presenting results of ITS SMT on November 4th, 2009. 2. Implemented Weekly Provider reports to allow operational managers the ability to manage to their SLAs "in month" 3. Developed "real life" Service Level Management presentation to educate ITS stakeholders on Service Level Management. 4. Planned SLA Target Review Workshops with each Service Owner to review SLA Targets, Calculation Methodologies/Frameworks and to obtain written approval regarding the targets. 5. Planned Business Intelligence Training for Provider groups to allow them to self-measure and dig into their Key Performance Indicators thus improving their ability to meet SLAs <p>-----</p> <p>End of Year Results:</p> <ul style="list-style-type: none"> - Implemented Cluster Top 5 priorities for F10-11 ITS Standard SLA. This included: <ol style="list-style-type: none"> 1. New measures for DS Application Certification, 2. a review of the ITS Hosting Measures & Targets, 3. New Employee Bundling via S.ODO, 4. Project Management Customer Satisfaction

		<p>Survey, 5. A new Quality Assurance metric for Service Desk - percentage of requests re-opened. Worked with Service Provider areas in ITS to gain acceptance of these new measures/changes for implementation for F10-11.</p> <ul style="list-style-type: none"> - Established annual review & sign-off of Service Level Measures & Targets with ITS Service Owners. Created "OLA" document per service and secured the signatures of each ITX01 and ITX02 associated with the ownership and delivery of that service. This satisfied a Service Management Audit requirement. - Implemented Monthly Service Level Management Practice report which focused on SLA compliance by measure and by incident. This enabled the SLM team to focus their efforts on the services in need of it the most. - Brought overall SLA Compliance by measure from 45% to 60% in the second half of F09-10. - Brought overall SLA Compliance by request from ~80% to over 90% in the second half of F09-10. - Completed over 15 Service Improvement Plans against EES, Desktop Services, EIT, NAS, Telecom & Service Desk which resulted in the above improvement in compliance. - Implemented enhanced Business Intelligence training for operational managers & supervisors in ITS to better understand their business and be proactive about identifying trends and improving service level compliance. - Implemented Weekly Provider Reports to enable Service Providers to react 'in-month' to SLA results and make operational decisions which could possibly influence SLA compliance.
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Learning Commitments

Key Competency	Learning Plan Activity	Details	Date Completed
Deliver	Other learning activities	HDI Support Centre Director Training	

Initial Performance Plan Review and Comments (Oct-26-2009)

Date	Created By	Action	Comment
Oct 14, 2009	Jim Kirk (employee)	Submitted For Initial Review	I look forward to continue to support the Branch during my temporary assignment

Jim Kirk

Employee Id: 308732
Email: Jim.Kirk@ontario.ca



			to the Best Practices Process Office portfolio in Service Management.
Date of Discussion:	Oct 26, 2009		

Midterm Review and Comments (Oct-30-2009)

Date	Created By	Action	Comment
Oct 30, 2009	Wynnann Rose (manager)	Midterm Review Finalized	Great results in a short period of time! You are making a real impact! Thanks.
Oct 30, 2009	Jim Kirk (employee)	Submitted For Midterm Review	I'm enjoying the new challenges associated with current assignment in the Best Practice Process Office
Date of Discussion:	Oct 30, 2009		

End of Term Review and Comments (Apr-14-2010)

Date	Created By	Action	Comment
Apr 14, 2010	Wynnann Rose (manager)	End of Term Review Finalized	Jim You were an absolute joy to watch in this role. You took the position on as a secondary job and you made it your own. You delivered considerable improvements in organization, staffing, management and processes. I am really proud of the work you did in BPO!
Date of Discussion:	Apr 14, 2010		