

OMES IS Organizational Evolution



Agenda

Discussion Topics

Mission and Vision

Organization Chart

Organizational Evolution Process

New Roles

Matrix Reporting

Transition Plans

Next Steps

What does this mean for me?

Discussion



OMES IS Vision

We are one, unified state IT resource – promoting collaboration, innovation and operational excellence while striving to provide quality services and become trusted advisers through strategic alliances and by contributing to the development of a more effective government for our citizens.



OMES IS Mission & Goals

To partner with State of Oklahoma agencies and affiliates to deliver quality, cost effective and secure information technology services.

► **Goals/Values:**

- Drive business innovation through technology.
- Promote collaboration across state entities.
- Utilize all government resources effectively and efficiently.



Organizational Evolution Process

Job Families

13 JOB FAMILIES AND <100 WORKING TITLES

- ▶ Administrative Officer
- ▶ Application Specialist
- ▶ Information Systems Manager
- ▶ IS Analyst
- ▶ Network Specialist
- ▶ Planning Specialist
- ▶ Project Manager
- ▶ Security Technician
- ▶ Server Support Specialist
- ▶ Service Desk Technician
- ▶ Systems Support Specialist
- ▶ Voice Communications Specialist
- ▶ Workstation Support Specialist



Why Job Families?

- ▶ Analysis and meaningful comparison against market statistics.
 - Compensation comparison.
 - Experience and education comparison.
- ▶ Clear and consistent career ladders for
 - Training.
 - Management.
- ▶ Common job duties and goals.



Why Job Families?

- ▶ This structure will help us handle:
 - Transition of knowledge transfer.
 - Improved recruitment.
 - Improved compensation levels and career ladders.



New Roles

New Roles

- ▶ Three new roles from the organizational evolution:
 - Agency IT strategist
 - Technical account manager
 - Account executive

NOTE: *Some agencies may already have someone in one of these roles, such as an IT director. We are not taking staff away. In most cases, we are giving you more staff.*



Agency IT Strategist

- ▶ This position will typically reside at an agency location for large agencies. Other agencies will be assigned an IT strategist from the OMES IS office.
- ▶ Primary duties and functions:
 - Provide technological guidance within an agency.
 - **Manage the day-to-day operations** of the IT department, including directing staff who support IT functions.
 - Consult with agency administration to discuss new approaches and equipment and system changes.
 - Assess and anticipate technology projects and recommend appropriate action and resources.
 - Establish and direct strategic and tactical goals, policies and procedures for the IT department as related to the representing agency business.



Technical Account Manager

- ▶ This is the point of contact for **day-to-day service issues**, help desk cases, outages, etc.
- ▶ Primary duties and functions:
 - Serves as the contact point to elevate cases, incidents and for customer issues that require IT services.
 - Attends OMES IS operational meetings to advocate for the customer and end users.
 - Consults with IT service owners regarding outstanding tickets and requests and IT needs of partners.
 - Coordinates the communication of completed and in-progress cases to the IT strategist, partners and senior management.



Account Executive

- ▶ Serves as the agency advocate by developing and maintaining relationships with executive leadership and ensuring the services provided align with agency goals.
- ▶ Primary duties and functions:
 - **Primary contact for all OMES IS business related needs, such as service catalog offerings, billing, MSA, invoices and IT procurement.**
 - Works with technical account manager and IT strategist to identify services and products to meet agency needs.
 - Works with IT Partnership Services to ensure services are added to the MSA and billed accordingly.
 - Assists technical account manager, IT strategist and agency with IT procurement by identifying approved vendors or contracts for services and products as well as the RFP process and ePro requests.
 - Works with partnership services to communicate and resolve invoice or billing discrepancies.



Matrix Reporting

Matrix Reporting

- ▶ **Matrix management** is the practice of managing people with more than one reporting line in a matrix organization structure.
- ▶ **Example:** Project managers may be in one office and report to a program manager, but these same project managers may also report to a separate IT strategists or resource manager while working on different projects. Each project manager may have to work under several managers to get the job done.



Matrix Reporting Example

- Determine what projects need to be done
- Sign off on deliverables

← **WHAT**

Technology
Strategy Director

Agency IT
Strategist
OKDHS

HOW →

Enterprise
Programs
Director

Program
Manager,
Eligibility and
Insurance

Project Managers
PM – OKDHS
PM – OKDHS
PM – OKDHS
PM – OKDHS

- Determine how to do project management
- Define standard deliverables
- Define standard processes

NOTE: Performance Management Process (PMP) is performed by the Direct Manager, with input from the "dotted line" manager.



Transition Plans

Transition Plans

- ▶ High level transition plans created for OMES IS service teams.
 - Transition plans will vary from team to team
- ▶ Each plan includes:
 - Identifying staff, agencies and groups that will be affected.
 - Categorizing staff into 13 job families and roles.
 - Developing a plan with directors while identifying risks and concerns.
 - Holding first team meeting.
 - Developing training plan for all roles.
 - Scheduling transitions with dates and staff affected for agencies.
 - Filling job roles needed for team.
- ▶ Individual transition plans
 - Transition plans will be completed for each job. It is important to meet agencies' needs.



Enterprise Programs

1/29/2015	Identify staff affected (34 project managers; 20 business analysts)	Complete
1/29/2015	Identify agencies and groups that will be affected (Ag, Network, Career Tech, Security, Servers, Corporation Commission, DOC, ODMHSAS, Education, DEQ, DHS, Health, Facilities, Portal, DPS, EGID, ODOT, OWRB, CORE).	Complete
3/2/2015	Transition OKDHS PMO staff.	Complete
5/1/2015	Hire and transition DOC project manager.	Complete
5/15/2015	Transition CORE staff.	Complete
6/3/2015	Hire and transition security project manager.	Complete
7/31/2015	Hire project manager and BA for the portal eGOV project.	
7/31/2015	Develop plan with directors for transition; identify concerns and risks for the agency for remaining PMs and BAs.	
7/31/2015	Produce a schedule of transition with dates and staff affected for remaining agencies.	
9/30/2015	Complete transition.	



Information Security

Identify agencies affected.	Complete
Identify staff affected.	Complete
Hire the agency services information security supervisor.	Complete
Agency services information security supervisor and information security director "road trip."	
Agency services information security supervisor to establish ASIST team meetings.	
Agency services information security supervisor to post DHS agency-embedded security engineer.	
Develop plan with each business segment director for transition; identify concerns and risks for each agency.	
Produce a schedule of transition with dates and staff affected for remaining agencies.	
Get billing model approved, and transition agencies to new security model as agencies security services transfer.	



Service Quality

	Identify staff affected and new titles (quality manager, quality supervisor, quality specialists, compliance specialists, performance specialists, configuration and change management supervisor).	Complete
	Identify agencies affected (DHS and Health).	Complete
6/29/2015	Revise staff and agencies affected after manager review. Hire Manager positions (ETA — 60 days after position approval).	
8/31/2015	Meet with affected directors and develop transition plan; identify concerns and risks. Produce a transition schedule (includes staff and agency dates) once a billing recovery model is in place or agency agrees to share resources.	
9/30/2015	Review schedule with directors identifying conflicts and concerns with the other schedules. Complete transition.	



Technology Strategy

1/1/2015	Develop organizational structure with sections, units, roles and responsibilities.	Complete
1/29/2015	Identify staff affected (40) — 25 agency IT strategists, 11 technical architects, 2 enterprise architects, 2 research associates.	Complete
1/29/2015	Identify agencies and groups that will be affected (DHS, OHCA, OMES, OCCY, OJA, ODRS, ODVA, JD McCarty, SDE, Career Tech, Corporation Commission, OTC, DAC, Indigent Defense, DOC, ABLE, CLEET, DPS, OSBI, DON, AG, DEQ, ODOT).	Complete
3/5/2015	Develop job descriptions.	Complete
4/15/2015	Initial categorization of staff into 13 job families and roles.	Complete
5/22/2015	Develop training plan for all roles.	Complete
7/31/2015	Hire additional full-time employee.	
7/31/2015	Develop plan with directors for transition; identify concerns and risks for agencies.	
7/31/2015	Produce a schedule of transition with dates and staff affected for remaining agencies.	
7/31/2015	Hold first team meeting.	
8/31/2015	Hire managers and leads.	
9/30/2015	Complete transition.	



Public Safety and Defense

Hold roundtable meetings to share progress on the PSD organization transition planning. Complete

Hold Tech Talk meetings and share the PSD future organization transitional charts and processes. Complete

Prepare the interim PSD operational organization chart. Complete

Prepare draft strategy for the CJIS Center for Excellence implementation. Complete

Create a unification concept for PSD agencies' mission-critical IT services.



Client Experience

12/9/2015	Roundtable discussion — developed guiding principles for customer service.	Complete
1/15/2015	Roles of technical account manager, account executive and IT strategist defined.	Complete
2/12/2015	Guiding principles posters delivered and displayed.	Complete
2/15/2015	Identify staff to be part of the Client Experience team; create organization charts of new structure.	Complete
3/10/2015	Introduce new organization chart at Tech Talk Tuesday.	Complete
4/15/2015	Finalize staff for Client Experience team; update organization charts to include names of new team members.	Complete
4/20/2015	Transition DOC service desk (Service by Agency unification).	Complete
6/24/2015	Mid-managers meeting.	
7/1/15 - 7/31/15	Hold initial meetings with Client Experience team members.	
8/15/2015	Schedule monthly staff meetings with Client Experience team members.	



IT Unification and Platform and Product Services

1/1/2015	Develop organization structure with sections, units, roles and responsibilities.	Complete
1/29/2015	Identify in-scope staff.	Complete
3/5/2015	Develop job descriptions.	Complete
4/15/2015	Initial categorization of staff into 13 job families and roles.	Complete
5/22/2015	Develop training plan.	Complete
7/31/2015	Develop plan with directors for transition; identify concerns and risks for agencies.	
7/31/2015	Hold first team meeting.	
8/31/2015	Hire staff for posted positions.	
9/30/2015	Complete transition.	



Technology Services

1/29/2015	Identify staff affected.	Complete
1/29/2015	Identify agencies and groups that will be affected.	Complete
7/31/2015	Develop plan with directors for transition; identify concerns and risks for the agency for remaining PMs and Bas.	
7/31/2015	Hire remote network services manager.	
7/31/2015	Produce a schedule of transition with dates and staff affected for remaining agencies.	
7/31/2015	Hold first team meeting.	
9/30/2015	Complete transition.	



Data-Driven Services

	Identify staff affected.	Complete
	Identify agencies affected.	Complete
6/29/2015	Revise staff and agencies affected after manager review. Hire manager positions (ETA — 60 days after position approval).	
8/31/2015	Meet with affected directors and develop transition plan; identify concerns and risks.	
9/30/2015	Produce a transition schedule, includes staff and agency dates.	
10/15/2015	Review schedule with directors identifying conflicts and concerns with the other schedules.	
	Complete transition.	



External Relations and Strategic Ventures

1/29/2015	Identify staff affected (15) — 1 IT partnership specialist, 1 strategic venture manager, 1 SV specialist, 1 strategic alliance specialist, 2 account executives, 1 proposal coordinator, 1 IT asset manager, 2 IT asset specialist, 1 DHS IT asset manager, 4 DHS IT asset specialists.	Complete
1/29/2015	Identify agencies and groups that will be affected (Health Business Segment, FARR Business Segment, SDE, DHS).	Complete
3/5/2015	Develop job descriptions.	Complete
3/6/2015	Transition IT Asset Team and proposal coordinator.	Complete
6/30/2015	Hire account executives.	
7/31/2015	Fill proposal coordinator and IT asset specialist vacancies; hire IT partnership and strategic alliance supervisors.	
7/31/2015	Develop plan with directors for transition; identify concerns and risks for the agencies.	
7/31/2015	Produce a schedule of transition with dates and staff affected for remaining agencies.	
9/30/2015	Complete transition.	



Application Services

- ▶ A new position will be posted on the OMES Employment Opportunities website for the application services IT director.
 - <http://www.jobaps.com/OK/sup/bulpreview.asp?R1=150624&R2=UNCB&R3=80>
 - Filing deadline is July 8, 2015
- ▶ Application process:
 - Job will be posted as all of the other jobs have been posted.
 - First interviews will be completed as a panel discussion.
 - Second interviews will be a presentation of a team strategic plan.



Next Steps

Next Steps

- ▶ Communications plan.
- ▶ OMES IS Service Team meetings.
- ▶ Personalized letter.
- ▶ Position level changes.
- ▶ Developer survey.



Communications Plan

▶ Agencies

- Email will be sent to update agencies on where we are at in the process.

▶ Employees

- Email from Bo Reese, CIO
- Transition Newsletter
 - Transition plan example
 - Job families and descriptions for each job family
 - Working titles
 - FAQs
 - Organization chart
 - Communication steps
- Meeting invite from service team IT director will be sent to OMES IS employees assigned to that team.
- Letter will be given to employee.
- Invitations to recurring meetings with OMES IS service teams.



OMES IS Service Team Meetings

- ▶ July/August 2015
- ▶ Meeting will provide
 - Upcoming steps in the organizational evolution.
 - Review of service team.
 - Transition plan.



Personalized Letter

- ▶ Personalized letters to employees will provide:
 - Assigned IT service team
 - Job family
 - Working title



Level Changes

▶ Classified Staff

- Classified staff will be placed into 1 of 11 service teams but will remain in their current job title unless an unclassified position is accepted.

▶ Unclassified Staff

- **Proposed HR Job Family** — This is one of the 13 job families presented previously. An example would be “application specialist.”
- **Proposed HR Position Level** — This is the level within each job family. Most families will have four levels. An example would be application specialist I, II, III or IV.
- **Proposed Working Title** — Most of the working titles will be descriptive in name. Working titles are created for the purpose of providing a defined title that can be easily identified by the general public. An example would be “development manager.”



Level Changes

► Examples

Current Title	Current Working Title	Proposed HR Job Family	Proposed HR Position Level	Proposed Working Title
Technician	PC Technician	Workstation Support Specialist	Workstation Support Specialist I	Workstation Support Specialist
Analyst	Business Analyst	Systems Support Specialist	System Support Specialist I	Business Analyst
Information Security Administrator	Information Security Administrator	Security Technician	Security Technician III	Security Engineer

► Challenges

- Identifying each person in the correct HR title and level.



Level Changes

► Plan

- Clearly define the levels for each job family.
 - IT directors
- Send out position surveys to all staff by job family.
 - OMES Human Capital Management
- Determine levels.
 - OMES Human Capital Management
- Review determined levels for accuracy.
 - Manager and IT director
- Place staff in the correct levels.
 - OMES Human Capital Management
- Identify any salary discrepancies.
 - OMES Central Accounting and Reporting
- Develop plan to correct salary discrepancies.
 - OMES IS Leadership and Executive Team



Applications Assessment

Long Term Goal: To have developers that are grouped by technology platform support.

Advantages:

1. Training and cross training opportunities
2. Career growth
3. Standards
4. Expanded support



Applications Assessment

How? A list of known applications will be sent to each developer and they will be asked to fill in the following information:

1. Number of hours spent doing analysis by application.
2. Number of hours spent doing development and support by application.

Tentative Schedule

- Send Survey the week of June 29.
- Response due by July 17.
- Manager Review completed by July 31.



Applications Assessment Example

Request No.:	Name:	Supporting Business Unit:	Browser Based: (yes/no)	Purpose:
39201	Accounting Project	Tourism & Recreation Department		Capital Improvements Expenditure Tracking
39199	Accounting System	Tourism & Recreation Department		Expenditure Tracking
39202	AOD (Advice of Deposits)	Tourism & Recreation Department		Fed by Revenue, notifying the Treasury Office of OTRD's bank deposits

Platform:	Application Type:	# Hours Spent on Analysis per Month	# Hours Spent on Development per Month	Notes
	Custom			

Platform	Application Type
AIX	Custom
Client Server	Cots
HP NonStop	Composite
iOS	
Mainframe	
NA	
Oracle	
Other	
Outsourced	
SaS/Cloud	
Unix	
Windows Computer	
Windows Server	
Web	



What does this
mean for me?

- ▶ Current job duties, reporting structure and physical location will remain the same unless you are notified otherwise. Unique situations may arise. We will only make decisions that have been reviewed by appropriate stakeholders.



Frequently Asked Questions

- ▶ **Are there going to be massive layoffs or pay cuts?**
Layoffs and pay cuts are not part of the organizational evolution plans. However, the future is unpredictable, and we cannot guarantee there will not be future layoffs for State of Oklahoma agencies.
- ▶ **When will we get a raise? Will we get merit raises or cost of living raises? What about longevity pay?** Once employees are categorized in comparable job families, then we can begin analyzing compensation levels against market data. Current employees are strongly encouraged to apply for any open position that interests them.

Cost of living increases are authorized by the Legislature. Longevity pay decisions are made at the State Capitol, and we have not heard anything about the program changing.



Frequently Asked Questions

- ▶ **When will job descriptions be completed?** We have job descriptions for each of the 13 job families. Individual job descriptions will be completed as we finalize the transition plan for each employee.
- ▶ **Is there a plan and timeline to establish clear areas of responsibility and oversight?** There is a high-level plan, and we are working through the details. It is not going to be all of the service teams at the same time, as some teams are moving faster than others, but there will be plans available in our upcoming communications.
- ▶ **If I move to another service area, what will happen to my workload at the agency I'm currently serving?** This depends on whether you are applying for a job or if you are being realigned due to the organizational evolution. If you are offered a position for which you have applied, there will be a transition period during which we must be careful to not put agency missions at risk. Your workload may temporarily increase to ensure the transition goes smoothly.

Employees who are realigned should not expect any initial changes when fit into common job families and working titles. Changes will start as we execute the agency-by-agency or service-by-service unification projects. Job duties, reporting structures and physical locations will remain the same until employees are notified otherwise.



Frequently Asked Questions

- ▶ **Will transition planning be part of the reorganization to help staff get from position A to position B?** Yes. The only way to do this level of transition planning is on an individual basis. It is important that we are meeting the needs of the agencies.
- ▶ **How is in-agency staff going to get training and stay current with their jobs?** The rate model frees us to fund more professional development, career paths and training for staff. Once we move to a service-rate model this will gradually improve.
- ▶ **What are we doing to recover the loss of institutional knowledge that occurs when valuable staff leaves?** We will get structures in place to make sure much of that knowledge is handed down, as well as to improve recruitment and retention. In turn, employees who fall in love with public service also need to be rewarded. This is one of the greatest reasons for realigning staff into job families and working titles.



Frequently Asked Questions

- ▶ More frequently asked questions can be found at:
 - <http://eclipse.omes.ok.gov>
 - Click on “Organizational Evolution” located in the left navigation.



Questions?

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**Call or email or visit during open office hours on
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