Ideas for Organizing a Smooth Transition

1. **Attend SLD orientation (6/2/04)**

2. **Attend Large Agency Transition Kick-off meeting (6/9/04)**

3. **Develop a work plan** identifying activities required to organize efforts (include planning sessions, workbook reviews, agency meetings and organizational communications)
   A. Include agency internal auditors to keep them apprised of transition activities and changes in agency processes

4. **Define focus group(s)** to determine agency issues
   (To ensure that you are protecting your agency's interests, it is helpful to appoint and organize resources by functional areas to address agency needs and VITA's requirements.)
   A. Review functional area checklists (included in the workbook under each functional area). Functional areas include Customer Service/VCCC, SCM, Finance, Technical, HR
   B. Assess agency-specific impacts to each functional area

5. **Develop tracking procedures** for collecting action items and issues to ensure resolution throughout the transition process

6. **Orient agency and transitioning personnel** to cultural changes and other transition activities; plan multiple open forum sessions to address questions and concerns
   (Identifying cultural and organizational changes and keeping agency staff abreast of transition activities and issues are key elements in minimizing fears.)

7. **Review VITA processes, policies and procedures** with agency and transitioning staff.
   (Accommodating new procedures within your own established processes might require modification and adjustment on the part of agency staff. Orient all affected personnel to ensure a smooth transition to the new processes.)
   A. **Orient agency and transitioning staff on VITA procurement procedures**
      (Procurement will be required through eVa; staff training and process review should be done.)
      i. Make changes, as applicable, to agency procurement system for interface with eVa
      ii. Review changes with affected personnel
      iii. Obtain eVa training for applicable personnel
   B. **Orient agency and transitioning staff on VITA Finance procedures**
      i. Define internal process for reconciling monthly VITA bills
      ii. Review VITA's invoice and billing processes
      iii. Review requirements for updating and reconciling agency's asset inventory
      iv. Prepare to update agency assets in FAACS, remembering to make the effective date the agency's date of transition
   C. **Review HR policies and procedures**
      (For example, there will be different time recording, leave request and payroll reporting and approval procedures. Transitioning personnel will need to be familiar with these.)
      i. Review required HR on-boarding activities
         a. Review web-based onboarding process with transitioning personnel
         b. Ensure completion of required forms available online at VITA's homepage
         c. Coordinate completion of other on-boarding activities required to be done in person
            (Examples: agency badges will have to be turned in and VITA badges distributed; certain forms require witnessed signature.)
      ii. Review process and prepare to transfer personnel in FATS

D. **Review technical requirements**
   i. Organize technical Subject Matter Experts (SMEs) to review the Technical Compliance Requirements document
   ii. Identify variances in agency's technology environment
   iii. Assess internal resource needs in completing the technical requirements
   iv. Document questions for review at the 6/30 feedback session

8. **Perform initial review of Transition Workbook**; identify questions, issues, assignments
   (If you begin identifying issues and questions early, they can be addressed in the agency feedback meeting on 6/30)
   A. Transition requires data collection for: VCCC key contact roles, IT contracts and POs, hardware and software asset inventory, mapping of 'unassigned' transitioning personnel, compliance with Technical Compliance Requirements
   B. Identify resources for data collection assignments
   C. Identify areas to be clarified; develop list of questions for agency feedback meeting

9. **Attend agency feedback meeting 6/30**; address transition questions

10. **Solicit input for inclusion in Special Notations**
    (The Special Notations is a section in the Transition Overview, the large agency transition document, where agency-specific issues and concerns are documented. A survey is an example of how you might solicit input for this section to ensure that concerns of the staff and agency are recognized and addressed.)
    A. Solicit input from agency personnel on agency-specific circumstances and conditions
    B. Plan and conduct meetings with functional leads and agency stakeholders to identify agency-specific issues
    C. Begin evaluating all input in preparation for discussion in agency-VITA Transition Overview meetings
       (There will be agency-VITA meetings dedicated to the preparation of the agency's Transition Overview document. Prior to these meetings, it is recommended that the agency identify, review and document all agency concerns. This will help ensure that all critical issues are raised during the Transition Overview meeting and can be tracked for resolution.)

11. **Prepare for VITA On-site Workshops**
    A. Coordinate availability of AITR, SLD, ESD, key agency SMEs for scheduled workshop
    B. Coordinate logistics for workshop as detailed in email notification
       (An email will be sent to the agency from VITA requesting help in preparing for the agency onsite meeting.)
    C. Review all workbook contents and transition deliverables with designated functional area leads and agency stakeholders
       i. Plan review sessions with agency functional area experts
       ii. Review all workbook contents and transition deliverables
       iii. Assess impacts of transition on organization, e.g. cultural changes, reporting and approval changes. Identify agency-specific issues and concerns.
            (Issues unique to an agency might include: questions on unassigned personnel, given their existing roles and responsibilities; disposition of software and hardware associated with agency-specific applications; particular IT contracts that may be considered out-of-scope. With VITA personnel dedicated to the agency for the day, the Onsite Workshop provides the opportunity to raise issues and discuss any questions and concerns that the agency has already identified.)
       iv. Document issues, questions for discussion at VITA Onsite Workshop

12. **Attend agency VITA Onsite Workshop**
    A. Discuss required activities, contents of transition deliverables and other agency-specific issues and concerns
    B. Address and document issues, questions, action items for follow-up

13. **Perform data collection and other required transition activities**
    A. Complete and submit LATT milestones
        i. Submit **ITSP to VITA's PMD**
        ii. **Customer Support Services**
            a. Identify and document **VCCC key contact roles**
            b. Submit VCCC spreadsheet to VITA CSS Lead
        iii. **HR**
            a. Update agency org chart with changes since Due Diligence
            b. Confirm transitioning personnel
            c. Evaluate/update mapping to VITA service family
            d. Submit **updated org chart and HR spreadsheet** to VITA HR
        iv. **Technical** - assessment and compliance implementation
            a. Complete technical compliance gap analysis, submit to VITA Technical Lead
            b. Develop compliance plan for agency
            c. **Update agency's technical environment to comply with Technical Compliance Requirements**; notify VITA Technical Lead of completion
        v. **SCM**
            a. Document **agency IT contracts on spreadsheet** and submit to VITA SCM Lead
            b. Compile **copies of IT contracts/POs** and submit to VITA SCM Lead
            c. Identify and document agency procurement approval process and contacts
            d. Evaluate eVa interface requirements
            e. Identify users requiring procurement tool training
        vi. **Finance**
            a. Identify users authorized for online Asset Inventory system and submit list to VITA Finance Lead
            b. Instruct all users to request Pegasus IDs online for access to Asset Inventory
            c. **Compile and upload hardware and software inventory data**
                (1) Identify agency assets and document in required format
                (2) Review asset purchase/surplus plans and evaluate impact on inventory, upload dates
                (3) Revise asset spreadsheets as necessary to reflect modifications
                (4) Upload asset spreadsheets to system 'staging area'
                (5) Validate contents in staging area
                (6) Move inventory to production
            d. Perform online updates as necessary to maintain currency of inventory

14. **Finalize agency-specific issues for Special Notations section in the Transition Overview**
    A. Conduct final meetings with functional leads and agency stakeholders to review and approve identified agency-specific issues
    B. Document Special Notations for discussion in agency-VITA Transition Overview meetings

15. **Attend Agency -VITA Transition Overview (TO) meetings**
    A. Schedule and conduct meeting with ESD, SLD, AITR and other stakeholders as identified by the agency
    B. Review and discuss Transition Overview template and consolidated Special Notation issues
    C. Document the agency-specific exceptions for inclusion in the Special Notations

16. **Agency Head and VITA CIO Sign-off on agency TO**
    A. **Transfer of IT personnel**
    B. **Transfer of IT assets**
    C. **Transfer of IT contracts**