INTEGRATED SUPPORT SERVICES PROJECT (ISSP)

DEPARTMENT CHAIRS RETREAT

AUGUST 23RD, 2016
AGENDA

- Project Overview
- Project Team Structure
- ISSP Guiding Principles
- Accomplishments To-Date
- Upcoming Key Milestones
- Upcoming Communication
- Questions?
PROJECT OVERVIEW

- The Business Challenge
- Project Approach
THE BUSINESS CHALLENGE

- A significant budget reduction for UWM is driving the institution to think of bold, innovative methods to deliver business functions for long term efficiencies and cost reduction savings.

- Current business practices/procedures inefficiencies and opportunities for ineffectiveness.

- Current business practices/procedures and compliance/security risks.

Given the seriousness of this context:

Administrative support services need to be delivered in the most efficient and effective manner, in order to ensure that our limited resources are deployed as strategically as possible and in support of UWM’s strategic directions.
PROJECT APPROACH

• A coordinated and inclusive approach
• Administrative services in scope
  – Finance & Accounting
  – Human Resources
  – Procurement (i.e. a combination of processes related to the acquisition of goods or services currently provided by the Accounts Payable and Purchasing departments)
  – Information Technology
• Identify opportunities to increase efficiency, effectiveness, and quality of these services to the campus
• Focus on how an integrated services model, which incorporates shared services components, may provide the foundation for service excellence
**PROJECT TEAM STRUCTURE**

**Executive / Project Sponsor**
Johannes Britz, Robin Van Harpen

**Functional Leadership Team**
Sylvia Banda, Bob Beck, Tim Danielson, Kathy Heath, Jerry Tarrer

**Project Core Team**

**Finance / Accounting**
Krystle Anderson, Carla Durand, Kristin Fekete, Pat Kissinger, Heather Lee, Tom Osmanski, Stephanie Plavec

**Leads**: Paul Klajbor, Dave Rice

**Procurement (Procure-To-Pay ‘P2P’)**
Jill Baum, Bonnie Gonnering, Barb-Breed Heidt, Kathy Kercheck, Amanda Obermeyer, Kim Scherzer, Angie Schmocker, Nicole Schueler, Andrew Thimmesch, Kim Wesley, Cindy Wirtz

**Leads**: Autumn Anfang, Tom Scrivener

**Human Resources**
Mario Babicic, Elise Bechly, Kurt Hennemann, Mark Mielenz, Jennifer Powell, Yvette Alicea-Reed, Amanda Thompson, Craig Wesley, Erica Yewllett

**Lead**: Karen Massetti-Moran

**Information Technology**
Chris Cook, David Crass, J. Shane Dunlap, Keith Emmons, Noelle Fredrich, Mike Grypp, Kevin Jahnke, Bob Meyer, Julie Reindl, Carla Sagert, JJ Stenitzer

**Leads**: Scott Kleba, Keith Kunkel

**Business Process Management Team**
Sylvia Banda, Heidi Janzen, Sara Tully

**Lead**: Kathy Heath

**Change Management Team**
Sylvia Banda, Heidi Janzen, Sara Tully

**Lead**: Kathy Heath

**Co-Lead**: Shannon Bradbury

**Functional Teams (Finance / Accounting, Procurement, Human Resources & Information Technology) Subject Matter Experts**
**Guiding Principle 1: Service Excellence and Value Enhancement**

ISSP will focus on how the business functions will provide service delivery excellence in support of UWM’s teaching and research mission.

Project Outcomes:
- Enhanced effectiveness of service, e.g. greater congruence between anticipated and actual outcomes, accuracy in business processing, etc.
- Enhanced efficiency of services, e.g. less time to complete processes, etc.
- Reduced risk of the functions via standardized compliance and security measures
- Enhanced ability for employees to partner with subject matter experts who possess appreciation and understanding of school/college or division needs to build integrated solutions
- Establishment of meaningful metrics to measure value added activities

**Guiding Principle 2: Inclusiveness**

ISSP will be inclusive in gathering perspectives, recognizing their value and engaging the existing governance bodies.

Project Outcomes:
- Maximize and enhance information collection

**Guiding Principle 3: Communication & Transparency**

ISSP communication will be responsive, designed to reach the largest audience possible, to keep people informed and to provide opportunity for ongoing input.

Project Outcomes:
- Enhanced dissemination of information and better project results
- Accountability
- Role clarity and standardization of business processes
**Guiding Principle 4: Staff Development**

ISSP will focus on creating a structure with clearly defined benefits and opportunities for the staff responsible for service delivery.

Project Outcomes:
- Role Clarity
- Appropriate alignment of salaries
- Identification of Career Paths
- Enhanced Professional Development Opportunities

**Guiding Principle 5: Maintaining Out of Scope Services**

ISSP will endeavor to preserve the level of support that units currently receive for services that are out of scope for this project.

Project Outcomes:
- Academic department administrators can focus attention on duties other than Human Resources, Finance & Accounting, Procurement and Information Technology

**Guiding Principle 6: Implementation Planning**

The ISSP Implementation Plan will be developed with careful consideration of the possible impact on individuals and on operating units, and will provide a transition period.

Project Outcomes:
- Maximize positive outcomes of re-organization

**Guiding Principle 7: Coordination**

ISSP will coordinate with unit level and other campus-wide planning efforts.

Project Outcomes:
- Avoidance of redundancy
- Enhanced efficiencies
ACCOMPLISHMENTS TO-DATE

• March 2015 – June 2016
  – Project Initiation & Planning
  – Project Team Formation
  – Lessons Learned from other institutions, including Boston University, University of Illinois, University of British Columbia, University of Kentucky, Wayne State University, Oregon State University, University of Michigan, among others
  – Identification & Engagement of Stakeholders
  – Identification, Documentation & Evaluation of Key Processes
  – Focused Data Gathering
  – “AS-IS” Final Report (Current State Assessment)
**“TO-BE” INITIAL DESIGN PHASE (JUNE – SEPT)**

- **Partnership** between UWM teams and Huron Consulting team to develop recommendations for a high-level service delivery model
- **Collaborative** and **iterative** process as model recommendations will be continually reviewed and refined by the teams
- Leverage input from UWM teams, the “AS-IS” report, UWM data analysis and Huron Education industry expertise to develop an initial high-level service delivery model design
- Develop Business Case, Change Management Plan and Implementation Roadmap
- Plan for Key Change Management and Implementation Considerations
- Develop approach to upcoming project communication

<table>
<thead>
<tr>
<th>High-Level Activities</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Kick-off / Review of Current State Analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiate Data Request</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conduct Baseline Data Analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop Future State Service Delivery Model (High-level)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop Business Case, Change Plan &amp; Impl. Roadmap</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Decision Point**

- Share business case for new service delivery model with various stakeholders
- Obtain leadership approval to proceed with detailed design and eventual shift to new service delivery model
UPCOMING COMMUNICATION – (NOW THRU SEPT)

• Chancellor’s E-mail Update, Provost’s E-mail Update, and the UWM Report
• Announcement about the AS-IS completion and the launch of the TO-BE phase
• Meeting with Governance Groups Leadership
• The ISSP Leadership Team will be meeting with the governance groups leadership to discuss how to approach the governance groups themselves and also how to approach the campus at large when there is a design proposal
• Chancellor’s Plenary on September 15th
• Campus announcement of the business case preliminary recommendations
• Monthly PReP/UBR meetings
• Ongoing project updates
• Campus-wide Communication
• Ongoing updates once design proposal is complete via ways that the governance groups will have suggested, as well as campus-wide Open Fora
• Continuous FAQ updates as project progresses

Detailed organizational design development and business process redevelopment - work anticipated/projected to commence after the project has received formal approval to proceed.
QUESTIONS?

INTEGRATED SUPPORT SERVICES

http://uwm.edu/isson-integrated-support-services/